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ABSTRACT

Developed during a project designed to provide a continuous, competency-based line of vocational training in business and office education programs at the secondary and postsecondary levels, this package consists of an instructor's guide and learning module for a course on office procedures. Various aspects of implementing and articulating secondary and postsecondary office-procedures courses are covered including course content, performance standards, student-teacher agreements, suggested instructional times, tasks addressed in the courses, outcome-referenced measures, equipment needed, and references. Among those topics addressed in the 49 task sheets included in the module are dress/grooming, human relations skills, positive work attitudes, establishing priorities, appropriate office furniture, letter styles, typing correspondence and reports, business composition, business communications, reprographics, filing, using various office machines, performing various bookkeeping and accounting procedures, making travel arrangements, taking inventory, preparing resumes, completing job applications, and handling job interviews. The task sheets include some or all of the following: performance objectives, performance actions, performance outcomes, suggested instruction times, performance standards, and related technical information. (MN)

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ARTICULATED INSTRUCTION OBJECTIVES GUIDE

FOR

OFFICE PROCEDURES

(MODULE 7.0)

PROJECT PERIOD

March, 1981 - February, 1982

(Pilot Model)

PREPARED BY
VOCATIONAL ARTICULATION
TASK FORCE COMMITTEE FOR BUSINESS AND OFFICE EDUCATION
REPRESENTING
THE SCHOOL DISTRICT OF GREENVILLE COUNTY
AND
GREENVILLE TECHNICAL COLLEGE
GREENVILLE, SOUTH CAROLINA

OCCUPATIONAL EDUCATION ARTICULATION PROGRAM
FUNDED BY
SOUTH CAROLINA APPALACHIAN COUNCIL OF GOVERNMENTS

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FEBRUARY, 1982

EDITION I

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ACKNOWLEDGEMENT

This articulated, performance-based instruction objectives guide is the product of the work of all the Business and Office Education Task Force Committee participants. Special thanks, however, are given to the following teachers who developed the initial drafts for Office Practices: Gladys Perrin and Creola Campbell.

The Task Force (writing) Committee for Office Procedures is indebted to the State Supervisor, Business and Office Education Consultant, Office of Vocational Education, South Carolina State Department of Education, for permitting the Committee to review a 1981 draft of the curriculum guide being developed for Office Procedures and incorporate that information in this articulated, performance-based instruction guide.

The professional interest of Miss Joanne Montague of The School District of Greenville County in editing this guide is appreciated.

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OFFICE PROCEDURES

LEVEL: Secondary

TITLE: Office Procedures

DESIGNATION: OFFICE PROC COMPUTER NUMBER: 604

DESCRIPTION: Office Procedures is designed to improve office skills already learned, to present new knowledge and skills, and to integrate skills, knowledge, traits, and attitudes to help students prepare for employment and advancement in office work. Emphasis is placed on problem-solving and logical-thinking skills. Course content involves bridging the gap between the school and the office. Personal traits and business ethics are stressed. Activities and studies are planned and implemented in an on-the-job atmosphere. Students may choose not to take Office Procedures if they enroll in a second year of Cooperative Office Education or in the Senior Intensified Program as much duplication occurs in the three programs.

OBJECTIVES: Given a simulated office environment with equipment and supplies, the student will set up and organize the work station, analyze tasks and establishing priorities concerning work that must be done, process incoming and outgoing mail, demonstrate effective telephone techniques handling incoming and outgoing calls, send electronic messages (telegrams, etc.), replace and store supplies, inventory equipment, file and retrieve information, type mailable copies and material, recommend appropriate types of office furniture and equipment, demonstrate acceptable oral business communications and human relations characteristics, and a critical attitude toward the finished product.

PREREQUISITES: Typewriting I
Suggested Grade Level: 12

REQUIRED/SUGGESTED INSTRUCTION HOURS:

System	Year or Semester		
Divisions	Class	Lab	Total
Credits	½-1		½-1
Hours	90-180		90-180

PERFORMANCE EVALUATION: Upon completing Office Procedures, the student should possess the ability to set up a clerical work station; organize and plan work; compose and type various types of office communications; perform reprographic functions; perform receptionist duties including handling telephone and personal contact responsibilities; establish and operate a filing system; conduct mail activities of the office; conduct the accounting functions typical of a small business office; and be familiar with word processing and data processing terminology and operations. In addition, the graduate of Office Procedures should possess the knowledge, skills, and traits, personal and professional, to qualify for initial employment in office work and should be able to locate employment opportunities and secure initial employment. Primary evaluation will be by performance and knowledge tests, checklist completed by the instructor, and the instructor's satisfaction that the graduate of the course has mastered the necessary competency to perform satisfactorily in an initial employment situation.

JOB QUALIFICATIONS: Successful completion of the objectives of Office Procedures prepares the student for entry level employment in clerical office work or for advance standing in a similar post-secondary level training program.

WORKING CONDITIONS: Typically, there are regular hours in professional or business surroundings. Some businesses may require occasional overtime. Work usually is routine and work in small offices may be varied.

SIMILAR PROGRAMS POST-SECONDARY LEVEL: There are no equivalent courses at the post-secondary level at Greenville Technical College for which a student may receive advanced standing.

SSC 119, Filing, and SSC 172, Machine Transcription, courses at Greenville TEC are similar in subject matter and a student who successfully completes the exemption requirements for those courses may be awarded advanced standing for secondary level mastery in Office Procedures.

At the present time, Greenville TEC does not exempt the course, SSC 166, Office Practices, because it requires specific activities which Greenville TEC prefers to teach for students completing the Associate Degree program.

OFFICE PROCEDURES
(Secondary Level)

Adopted from Outline of High School Credit Courses by the South Carolina State Department of Education, 1980 issue.

OFFICE PROCEDURES

Office Procedures is designed to improve office skills already learned, to present new knowledges and skills, and to integrate skills, knowledge, traits, and attitudes to help students prepare for employment and advancement in an office. Emphasis is placed on problem-solving and logical-thinking skills. The course content involves bridging the gap between the school and office. Personal traits and business ethics are stressed. Activities and studies are planned and implemented in an on-the-job atmosphere. Students may choose not to take this course if they enroll in a second year of Cooperative Office Education or the Senior Intensified Program, as much duplication occurs in the the three courses.

The student will be able to:

1. Demonstrate the ability to organize and set up a secretarial work station.
2. Demonstrate the ability to analyze problems and work independently.
3. Process incoming and outgoing mail properly and efficiently.
4. Demonstrate effective telephone techniques such as greeting, referrals, voice control, screening calls, and using the telephone directory intelligently.
5. Display a knowledge of telegraphic terminology and services.
6. File and retrieve information quickly.
7. Demonstate skill in preparing and typing forms, reports, and business correspondence.
8. Comprehend the importance of good human relations, company policies, loyalty to company and employer, and not revealing confidential information.
9. Establish priorities in proper sequence for effective completion of tasks.
10. Recommend appropriate types of office furniture and equipment and the replacement and storing of supplies.
11. Display critical attitudes toward the finished product, with emphasis on accuracy, word division, proofreading, and neat corrections.

STANDARDS

MODULE 7.0, OFFICE PROCEDURES

STANDARDS

MODULE 7.0, OFFICE PROCEDURES

Standards specified in other Business and Office Education articulated, performance-based instruction guides with similar training are applicable to Module 7.0, Office Procedures.

Standards, Module 1.0, Typewriting I

Standards, Module 2.0, Typewriting II

Standards, Module 3.0, Shorthand I

Standards, Module 4.0, Shorthand II

Standards, Module 5.0, Accounting I

Standards, Module 6.0, Accounting II

In addition to the standards stated in Modules 1.0 - 6.0, the standards on the following pages are applicable to Module 7.0, Office Procedures.

STANDARDS FOR STROKING AND MANIPULATIVE CONTROL

STROKING

When typing, the student will demonstrate the following technique rules:

1. Make quick, sharp, even strokes
2. Make low, direct reaches to the keys
3. Keep the fingers well curved
4. Snap the fingers back for quick getaway keystrokes

MANIPULATIVE CONTROL

When typing, the student will demonstrate the following technique rules:

1. Return the carriage quickly and smoothly
2. Use an efficient down-and-in motion on the space bar and not hesitate before or after the space bar stroke
3. Operate the shift keys skillfully
4. Operate the tabulator bar or key skillfully and without hesitation
5. Insert and remove paper from the machine briskly
6. Operate the margin release, backspace key and other "touch" mechanisms skillfully and without looking up

STANDARDS FOR CAPITALIZATION

1. Capitalize the first word of a sentence or a group of words that is used as a sentence.

2. Capitalize a direct quotation that is a complete sentence. Do not capitalize indirect quotations and direct quotations that are not sentences.

3. The first word following a colon may be capitalized if it is the first word of a rule or of a sentence.

4. Capitalize all proper nouns, including the names of persons, days of the week, months, holidays, geographic localities, races, buildings, government bodies, political parties, historical events, organizations, and so on.

5. Capitalize words like river, lake, street, avenue, building, ocean, school, mountain, park, city, state, company, and hotel when they are part of a specific proper noun.

6. Capitalize adjectives derived from proper nouns.

7. Do not capitalize words that were originally proper nouns but that are no longer associated with the person, place, or thing whose name they carry. (Consult an up-to-date dictionary when in doubt.)

8. Do not capitalize the seasons--spring, summer, autumn, fall, winter--unless they are represented as a person.

9. Capitalize the points of the compass and nouns and adjectives derived from them when they refer to regions of the country. Do not capitalize such words when they merely indicate direction or general location.

10. Capitalize a common noun when it replaces the complete proper name only if the common-noun form warrants the special distinction that capitalization gives it. For example, the U.S. Constitution, but a constitution.

11. Capitalize company referring to your own employer only if office policy requires it. In any case, do not capitalize company in such phrases as our company and this company.

12. Capitalize the names of specific courses of study, but do not capitalize the names of subjects, with the exception of any words that are derived from proper nouns. For example: I plan to take English in the fall.

13. Capitalize such terms as no., chapter, division, section, model, article, exhibit, lists, room, volume, policy. Do not capitalize page, line, paragraph, note, size, and verse.

14. Capitalize the names of specific departments, divisions, committees, and similar units within your own organization and also the short forms of such names. Do not capitalize these terms when they are preceded by a word other than the. When the word our or your precedes the terms, they are usually not capitalized.

15. Capitalize trade names but not the name of the product itself.

16. Capitalize the principal words in the titles of books, articles, plays, reports, paintings, and so on. Do not capitalize the, an, or a unless one of these words is the first word of a title, and do not capitalize conjunctions or prepositions of fewer than four letters.

17. Capitalize titles when they precede a name unless the name is used in apposition and is set off by commas. Do not capitalize titles when they follow a name unless they refer to high-ranking government officials on the state, national, or international level. This rule does not apply to titles in the inside address of a letter or to titles typed in an address on an envelope.

18. Capitalize titles used in direct address. Also capitalize titles such as Father, Mother, Uncle, and Aunt and titles of high government officials when they are used in place of a specific proper name. Do not capitalize such titles when they are introduced by words like a, an, my, his, or our.

STANDARDS FOR PUNCTUATION

COMMA

Rules

(1) In citing a date within a sentence, set off the year with commas.
Ex. On May 24, 1975, we transferred our account to a bank in Phoenix.

(2) When two or more adjectives modify a noun, separate them by commas if they bear equal relationship to the noun.
Ex. A brilliant young lecturer gave an interesting, informative talk.

(3) Separate by commas a series of words or a series of phrases.
Ex. They like to receive letters that are short, clear, and friendly.

(4) Use a comma after a dependent clause that precedes a principal clause. (Do not set off a clause used as a subject or predicate.)
Ex. When we are angry, what we say may not be precisely what we mean.

(5) Use commas to set off a nonrestrictive appositive, but do not set off a restrictive appositive.
Ex. Mr. Poe, our professor of English, reviewed the book Autumn Wind.

(6) Separate with a comma two consecutive, unrelated numbers.
Ex. In 1969, 135 firms used this plan. During 1974, 32 discarded it.

(7) Use commas to set off a nonrestrictive clause.
Ex. This trip, which is recommended in all guide books, costs little.

(8) Use a comma to separate coordinate (independent) clauses joined by one of the coordinating conjunctions (and, but, for, nor, or, and sometimes so and yet.
Ex. A position is open, but I cannot interview anyone to fill it.

(9) Use a comma to set off an introductory phrase containing a verb.
Ex. To qualify for this job, applicants must write effective letters.

(10) Use commas to set off words and phrases that are parenthetic (not essential to the sentence structure).
Ex. Learning to typewrite, for example, requires consistent practice.

(11) Use commas to set off words of direct address.
Ex. Thank you, Mr. Cole, for sending the portraits to me so promptly.

(12) Use a comma to separate a city and a state name.
Ex. Our annual meeting will be held in Cleveland, Ohio, on August 21.

TERMINAL PUNCTUATION

Rules

(1) A complete declarative or imperative sentence has a period for terminal punctuation.
Ex. The mastery of an art requires insight and technical proficiency.

(2) A request in the form of a question is usually punctuated with a period.
Ex. Will you please have Mr. Johns sign the six copies of the report.

(3) Use a question mark after a direct question--not after an indirect question.
Ex. He asked how long she has worked for you. When did you hire her?

(4) Use an exclamation point after a word, a phrase, or a sentence to indicate strong emotion or to carry sharp emphasis.
Ex. Your sales met your quota! Congratulations! You earned a bonus.

SEMICOLON AND COLON

Rules

(1) Use a semicolon between independent clauses of a compound sentence when no conjunction is used.
Ex. The statements did not come with his letter; they may come today.

(2) Use a semicolon between independent clauses of a compound sentence that are joined by a conjunctive adverb (however, therefore, etc.).
Ex. We had engine trouble; consequently, we could not arrive in time.

(3) Use a semicolon to separate independent clauses of a compound sentence if any of the clauses are punctuated with commas.
Ex. You can take Fay, Helen, and John; and the others will go by bus.

(4) Use a colon to introduce an enumeration or listing.
Ex. Please ship us the following parts: fuse box, light, and switch.

COLON AND HYPHEN

Rules

(1) Use a colon to introduce a question or long quotation.
Ex. The question is this: What experience is necessary for the jobs?

(2) Two spaces follow a colon except when used between sets of reference initials in a letter or to separate hours and minutes. As a rule, use figures with a.m. and p.m.
Ex. We finished the tour at 12:45 p.m. and left the city at 5:26 p.m.

(3) Use a hyphen in compound numbers from twenty-one to ninety-nine.
Ex. Approximately thirty-seven of the forty-eight delegates attended.

(4) Retain the hyphen in a series of compounds with the same ending or beginning; this is called suspended hyphenation.
Ex. Each 2- and 3-day tour is taken in a school-owned or -leased bus.

HYPHEN AND DASH

Rules

(1) Use a hyphen to join compound adjectives preceding a noun.
Ex. The well-known statesman has been appointed for a four-year term.

(2) Use a dash (--) to indicate a sudden change in thought.
Ex. The best way--perhaps the only way--to have friends is to be one.

(3) Use a dash (--) for emphasis to set off an appositive.
Ex. Your stars--freedom, opportunity, faith--are bright and constant.

(4) Use a dash (--) to introduce the name of an author when it follows a direct quotation.
Ex. "The road to freedom, while narrow, is a two-way street."
--Gross.

PARENTHESES

Rules

(1) Use parentheses to set off parenthetical or explanatory matter.
Ex. Ralph (my cousin) lives in the capital city of Arizona (Phoenix).

(2) Use parentheses when an amount expressed in words is followed by the same amount in figures.
Ex. I can sell my home to them for thirty thousand dollars ($30,000).

(3) Parentheses may be used to enclose enumerations.
Ex. We should all work for (1) speed, (2) control, and (3) good form.

(4) A punctuation mark is placed inside the closing parenthesis if it applies to the parenthetical material.
Ex. Bring the late report with you. (We have a copy of the old one.)

(5) A punctuation mark follows the closing parenthesis if it punctuates the sentence itself.
Ex. I shall call him (the clerk, I mean), but I shall call you first.

(6) A reference in parentheses at the end of a sentence is placed before the period. If the reference is a complete sentence, it is written as a complete sentence and enclosed in parentheses.
Ex. You will find the pictures you desire in the new book (page 137).

APOSTROPHE

Rules

(1) The singular possessive is usually formed by adding 's; but for words having more than one syllable and ending in s, only the apostrophe is added.
Ex. The Countess' son (my boss's uncle) financed his brother's trips.

(2) When plural nouns do not end in s, add 's to form the possessive.
Ex. Children's shoes and women's robes are on sale at the local shop.

(3) Add only the apostrophe to form the possessive of plural nouns ending in s.
Ex. The girls' shoes and boys' coats will be shipped by fast express.

(4) The possessive of initials, abbreviations, etc., is formed with 's.
Ex. William Wright, Jr.'s signature must appear on the YMCA's checks.

(5) When common possession is to be shown for two or more persons, use 's with the last name only.
Ex. Van and Bert's mother is here; Jan's and Pat's mothers have left.

(6) Possessive pronouns do not take an apostrophe. (It's is the contraction if it is and thus requires an apostrophe.)
Ex. The book is hers. Its cover is torn, so wrap it with great care.

(7) When a one-syllable proper name ends in s, add 's for possession.
Ex. Bess's talk on current events was better than Mr. Nance's report.

(8) Add only an apostrophe to show possession with a multisyllable proper name ending in s.
Ex. Carl Williams' store is only one block from Vince Marques' house.

(9) Company and organization names sometimes omit the apostrophe.
Ex. She walked from Wilson's Department Store to Citizens State Bank.

(10) It is better not to use the possessive form for inanimate objects; but business sanctions the possessive with day, month, year, etc.
Ex. It's true that eight years' work was destroyed in one day's time.

(11) Use 'd to form the past and past participle of coined words.
Ex. The office manager X'd out the last line; then he OK'd the cable.

QUOTATION MARKS

Rules

(1) Enclose a direct quotation with quotation marks.
Ex. This man wrote, "Happiness is not the end of life; character is."

(2) When a quotation is broken by such expression as he said, enclose both parts of the quotation marks.
Ex. "Great minds," Irving wrote, "have purposes; others have wishes."

(3) Place periods or commas inside the closing quotation mark.
Ex. "What we need," Harry said, "is dirtier hands and cleaner minds."

(4) Place semicolons or colons outside the closing quotation mark.
Ex. She said, "I listen for facts"; I know she concentrates on ideas.

(5) Place question marks or exclamation points inside closing quotation marks when they are part of the quotation; place them outside when they refer to the entire sentence, of which the quotation is but a part.
Ex. Did he read "A New Asia"? I called, "Strike while others sleep!"

(6) Enclose in quotation marks the titles of magazine articles, reports, lectures, subdivisions of printed works, and theses. (Underline or type in all capitals titles of books, magazines, and newspapers.)
Ex. Chapter 3 of Management Today is entitled "Model Office Systems."

STANDARDS FOR NUMBER USAGE

1. Spell numbers from one to ten except when used with numbers above ten.

2. Always spell a number beginning a sentence even though figures are used later in the sentence.

3. As a general rule, spell the shorter of two numbers used together.

4. Spell isolated fractions in a sentence, but type a series of fractions in figures. Use the diagonal (/) for fractions you make.

5. Numbers preceded by nouns are usually expressed in figures.

6. Express measures, weights, and dimensions in figures without commas.

7. Use the percent sign (%) with definite numbers typed in figures. Use percent (spelled) with approximations and in formal writing.

8. Spell names of small-numbered avenues and streets (ten and under). Type house numbers in figures except for house number One.

9. Use a comma to separate (a) unrelated groups of figures which come together and (b) whole numbers into groups of three digits each (however, policy, year, page, room, telephone and most serial numbers are typed without commas).

10. Use a colon to separate hours and minutes expressed in figures.

11. Use a hyphen to join compound numbers from twenty-one to ninety-nine.

12. Use parentheses to enclose figures that follow spelled-out amounts.

13. Use an apostrophe as a symbol for feet in billings or tabulations or as a symbol for minutes. The quotation mark may be used as a symbol for inches or seconds.

14. Use apostrophe and s to form the plural of most figures. In market quotations, form the plural of figures by the addition of s only.

15. Type dates and time in figures, except in very formal writing.

STANDARDS FOR WORD DIVISION

1. You may divide words at the ends of lines to keep the right margin as even as possible. Excessive division should, however, be avoided.

2. Divide words between syllables only, as fore-noon and bom-bard. When in doubt, use the dictionary to help solve word-division problems.

3. Do not divide words of only one syllable, such as friend, thought, or trained. Do not separate a syllable without a vowel; as, didn't.

4. Do not divide a word of seven or fewer letters, such as also, duty, or going.

5. Do not separate a one-letter syllable at the end of a word; as enough.

6. Do not separate a one- or two-letter syllable at the end of a word; as ready, largely, higher.

7. You may usually divide a word between double consonants; as cor-rect, mil-lion, mes-sage.

8. When adding a syllable to a word that ends in double letters, divide after the double letters of the root word; as express, express-ing.

9. When the final consonant is doubled in adding a suffix, divide between the doubled letters; as, begin, beginning.

10. Divide hyphenated compounds only at the point of the hyphen.

11. Avoid dividing abbreviations, numbers, and proper names. When necessary, separate a surname from the initials or given name.

12. Separate the parts of a date, if necessary, between the day of the month and the year.

13. Do not divide the last word on a page.

14. Every effort should be made to avoid dividing words on more than two consecutive lines.

STANDARDS FOR MAILABILITY - GENERAL

One or more of the following errors would cause a letter to be unmailable:

1. Misspelled word or name
2. Material omitted
3. Strikeover
4. Careless erasures
5. Serious misplacement
6. Ommissions of date
7. Transposed words
8. Errors in figures
9. Smudge marks
10. Raised capital letters
11. Single line on second page
12. Incorrect word division
13. Incorrect punctuation points
14. Incorrect linespacing
15. Material not divided into correct paragraphs
16. Material deleted
17. Errors in letter style

STANDARDS FOR MAILABILITY - OPTIONAL

Mailable, no reservation

Error-free. May have up to two corrections per page, if neatly done.

Mailable, with reservations

Extra space between words.
Failure to space twice after end-of-sentence punctuation.
Top margin 1½ or more inches smaller than bottom margin.
Top margin 1½ or more inches larger than bottom margin.
Signature line six or more spaces below complimentary close.
Enclosure notation placed before reference initials.
Secretary's reference initials omitted.
More than two neat corrections in one letter.

Mailable after correction

Incorrect spelling of word or name.
Failure to capitalize proper noun.
Capitalization of word when not necessary.
Omitted period at end of sentence.
Use of period instead of question mark.
Omission of comma between day and year in date.
Omission of comma between city and state.
Omission of commas between items in a series.
Omission of comma when needed to separate two independent clauses.
Omission of comma after an introductory clause.
Apostrophe omitted in possessive case.
Failure to use a colon before a listing of items.
Omission of date on letter.
Omission of two-letter state abbreviation with ZIP code.

Unmailable

Improper word division.
Addition or omission of word which changes meaning of sentence.
Transposed words.
Disagreement of subject and verb.
Failure to spell out number when used at beginning of sentence.
Left margin more than one inch smaller than right margin.
Left margin more than one inch larger than right margin.
Left margin uneven at other than paragraph indentions.
Right margin uneven--more than one inch between longest and shortest lines.
Uneven paragraph indentions.
Failure to double-space between paragraphs.
Signature line two spaces below complimentary close.
Letter askew on page (going uphill or downhill).
Dirty type.
Unattractive correction.

Handwritten correction.
Strikeover.
Smudges.

SOURCE: Business Education World, March-April, 1981, "To Mail or Not to Mail--An Answer from the Business World," pp. 22-23.

CURRENT POSTAL STANDARDS*

1. Everything is typed in all caps.

2. All punctuation is eliminated.

3. Single space the address regardless of the number of lines, using a maximum of four lines.

4. A maximum of 22 spaces is allowed for the city, state, and ZIP Code: 13 or less positions, 1 space between city and state, 2 positions allotted for the state, 1 space between the state and ZIP Code, and 5 positions for the ZIP Code.

5. When used, the addressee notation ATTENTION is placed on the second line of the envelope address. All other addressee notations are to be typed a triple space below the return address.

6. The address must begin not less than one inch from the left edge of the envelope and it must end within at least one inch from the right edge of the envelope. The city, state, and ZIP Code must be more than one-half inch from the bottom margin of the envelope. No printing can appear to the left, right, or below the mailing address.

7. Abbreviate only those items listed in the "Address Abbreviations" section of the National ZIP Code Directory.

8. Postal notations are typed a triple space below postage stamp.

9. These postal regulations are subject to change. Check annually with the post office for these changes.

*February, 1981

STUDENT-TEACHER AGREEMENT
FOR
PERFORMANCE-BASED LEARNING

_____

_____

DIRECTIONS: The student, after reviewing the objectives and standards for the course either individually or as a member of the class, will check the appropriate course title block, sign his/her name at the bottom of the page, and indicate the school, and date. The student and instructor by signing the agreement indicate that they will abide by the stated objectives and standards of the course.

THIS STATEMENT CERTIFIES THAT I HAVE READ THE OBJECTIVES AND STANDARDS FOR:

( ) Typewriting I

( ) Typewriting II

( ) Shorthand I

( ) Shorthand II

( ) Accounting I

( ) Accounting II

( ) Office Procedures

( ) Other: _____

AND THAT I FULLY UNDERSTAND THE CONTENT OF THE OBJECTIVES, COURSE REQUIREMENTS, AND GRADING PROCEDURES.

STUDENT'S SIGNATURE _____

SCHOOL _____

DATE _____

INSTRUCTOR'S SIGNATURE _____

OFFICE PROCEDURES

MODULE 7.0, SUGGESTED INSTRUCTION TIME

SUMMARY
SUGGESTED INSTRUCTION TIME
Module 7.0, Office Procedures

OFFICE PROCEDURES MODULE/TASK		SUGGESTED HOURS
7.01	Proper Techniques for Good Body Care-Personal Development	1-3
7.02	Dress/Grooming - Personal Development	1-3
7.03	Display Physical Poise - Personal Development	1-3
7.04	Human Relations Skills in Personal Development	2-3
7.05	Display a Positive Attitude Toward Work - Personal Development	1-3
7.06	Set Up Work Station	2
7.07	Planning Work and Establishing Priorities	5
7.08	Recommend Appropriate Types of Office Furniture	2
7.09	Demonstrate Basic Typewriter Functions	5
7.10	Letter Placement and Styles	5
7.11	Type Correspondence or Reports from Rough Drafts	10
7.12	Business Composition	10
7.13	Type Pre-Printed Business Forms	10
7.14	Machine Transcription	8
7.15	Oral Communications in Business	4
7.16	Perform Receptionist Duties	4
7.17	Effective Telephone Techniques	3
7.18	Mailing and Shipping Services	5
7.19	Reprographics	3
7.20	Collate Materials	1
7.21	Establish a Filing System	10
7.22	Retrieve Materials from Files	2

OFFICE PROCEDURES MODULE/TASK		SUGGESTED HOURS
7.23	Cross-Reference Documents	2
7.24	Keep Tickler or Follow-Up Files	2
7.25	Travel Arrangements	5
7.26	Write Checks	2
7.27	Endorse Checks	2
7.28	Deposit Checks in Bank	2
7.29	Reconcile Bank Statements	3
7.30	Maintain a Petty Cash Account	3
7.31	Prepare Payroll Records	5
7.32	Prepare Federal Tax Deposits	5
7.33	Prepare Employer's Quarterly Federal Tax Returns	5
7.34	Prepare Employer's Annual Reconciliation Reports of Income Tax Withheld	5
7.35	Prepare State Unemployment Tax Return	5
7.36	Replacing and Storing Supplies	5
7.37	Take Inventory	2
7.38	Word Processing - Terminology	1
7.39	Employing Word Processing Concepts in an Office	2
7.40	Proofread and Revise Documents - Word Processing	5
7.41	Use Power Typewriter - Word Processing	8
7.42	Data Processing - Terminology	1
7.43	Recognize Computer Concepts - Data Processing	5
7.44	Locate Employment Opportunities	2
7.45	Prepare Resume	1
7.46	Compose Follow-Up Letter	1
7.47	Compose Application Letter	1

OFFICE PROCEDURES MODULE/TASK		SUGGESTED HOURS
7.48	Complete Application Form	1
7.49	Interview for Job	2
TOTAL INSTRUCTION TIME:	(Two semester course)	180
	(One semester course)	90

NOTE: For the One Semester Course, 90 Hours Total, the suggested instruction hours per objective may be divided in half or some objectives may be omitted or combine with other objectives to facilitate desired skill development.

TASK LISTING

MODULE 7.0, OFFICE PROCEDURES

7.09 (Demonstrate Basic Typewriter Functions) Given an electric (or manual) typewriter, demonstrate basic typewriter functions appropriately. The functions should include; centering, tabulating, underlining, aligning on prepared forms, addressing large and small envelopes, and interpreting proofreader's marks.

7.10 (Letter Placement and Styles) Given three edited, rough-draft letters, required supplies, plus instructions for typing any special features; type the letters in the format specified by the instructor, making one carbon copy. A checklist will be used to rate performance: all applicable items must receive an acceptable rating on the checklist.

7.11 (Type Correspondence or Reports from Rough Drafts) Given at least three edited, rough-draft pieces of correspondence or reports, instructions for typing, a typewriter, and typing paper; type the correspondence or reports according to instructions making one carbon copy. The correspondence must be mailable so that; (1) the copy contains no typographical errors, (2) format and style conform to office policy, (3) the copy is legible, and (4) no smudges or extraneous marks are present.

7.12 (Business Composition) Given business situations requiring correspondence responses, the student will develop skill in business composition.

7.13 (Type Pre-Printed Business Forms) Given four pre-printed business forms that require typing on line, in blocked-in areas (boxes), after guide words, or in columns (such as purchase order, purchase requisition, invoice, acknowledgement, check, form letter, payroll time sheet, business contract, telegram, personnel form, or voucher), plus the necessary information for completing the forms, type the information onto the forms in the appropriate spaces. Placement of copy must be consistant and evenly aligned, with all errors neatly corrected.

7.14 (Machine Transcription) Given a transcription machine, supporting supplies, a typewriter, prerecorded message; type the correspondence in mailable copy with 100 percent accuracy with carbon copies as required, following dictated instructions.

7.15 (Oral Communications in Business) Given a simulated office situation or role play by the instructor, demonstrate clear, precise, and complete business speech to communicate information, convey instructions, or transmit decisions. Business speech should be slightly more formal that that used with close friends and family and has a specific purpose. 100 percent accuracy in content is to be communicated.

7.16 (Perform Receptionist Duties) Given a receptionist assignment, work station and situation calling for action; demonstrate the ability to perform receptionist duties, meeting standards of personality courtesy, poise, speaking clearity, taking names accurately, and giving accurate information acceptable to the instructor.

7.17 (Effective Telephone Techniques) Given a telephone, note pad, pencil, simulated telephone exercises by the instructor, display a pleasing voice control, courteous telephone manner, and proper telephone procedures in handling a variety of business incoming and outgoing telephone calls and write two telephone messages received by telephone with 100 percent accuracy, neatly and legibility, and forward the messages to another person.

7.18 (Mailing and Shipping Services) Given a variety of incoming and outgoing mail, including letters and packages, meeting current postal regulations for outgoing mail and sorting, opening, and routing official mail correctly.

7.19 (Reprographics) Given stencils, masters, and documents for duplicating, demonstrate the ability to reproduce on ink duplicator, fluid duplicator, and photocopy machine, a multi-page report, collate copies, following manufacturer's instructions to 100 percent accuracy and to the instructor's satisfaction.

7.20 (Collate Materials) Given an automatic collator and instructions concerning its operation, a master set, and materials; collate the materials so that each collated set is in the order corresponding with the master set. Given materials to collate by hand, collate the material so each collated set is in the order corresponding with the master set.

7.21 (Establish a Filing System) Given two case situations to establish filing systems, establish filing systems that best meet the needs of each situation. Record your proposed plans. Performance will be evaluated on completeness and appropriateness as judged by the instructor.

7.22 (Retrieve Materials from Files) Given ten requests for information from the files, obtain the necessary documents and give requested information to the instructor in written form. Performance will be based on the accurate retrieval of the requested information with at least nine of the ten requests accurately relayed to the instructor.

7.23 (Cross-Reference Documents) Given ten documents, some of which should be cross-referenced, accurately prepare cross-reference sheets for appropriate documents the satisfaction of the instructor.

7.24 (Keep Tickler or Follow-Up Files) Given a tickler file, transactions requiring the use of the file, and supplies to complete required tasks, maintain the tickler file for one week. A checklist will be used to rate performance and all items must receive an acceptable rating.

7.25 (Travel Arrangements) Given a case situation to plan and schedule a business trip for the employer, prepare an itinerary and make the necessary travel arrangements. A checklist will be used to rate performance and at least nine of the ten items must be rated acceptable.

7.26 (Write Checks) Given check records, blank check forms, and five bills to be paid, complete the check records and write the checks. All items must be accurately and legibly completed on checks and check records for acceptable performance.

7.27 (Endorse Checks) Given three checks and information on how the checks will be cashed or deposited, endorse each check using the blank, restrictive, or full method of endorsement, as appropriate for the situation. Each endorsement must be in accordance with the accepted method of endorsement and appropriate for the situation.

7.28 (Deposit Checks in Bank) Given a bank deposit slip, five checks, and currency and coins (simulated money acceptable), prepare deposit slip and items for deposit with 100 percent accuracy and deposit in bank (or cashier's office).

7.29 (Reconcile Bank Statements) Given a bank statement, cancelled checks, previous monthly bank reconciliation statement, check stubs or check register, cash ledger sheet and record of deposits, reconcile the bank statement. The balance in the cash account and the reconciled statement must be in agreement and represent the actual cash balance.

7.30 (Maintain a Petty Cash Account) Given a check, journal, and ledger, write a check for cash, journalize the entry, and post the entry to the ledger to establish the petty cash fund. Write vouchers for any money paid from the petty cash fund. Total all vouchers for any money paid from the petty cash fund. Total all vouchers, compare the total of vouchers from petty cash to the beginning petty cash balance, write a check for the difference, journalize and post the entry. Accuracy should be 100 percent with the account in balance.

7.31 (Prepare Payroll Records) Given withholding tables, complete tables, complete time cards, payroll register, employees' payroll records, journal, and checkbook, prepare payroll records without errors in entries or computations.

7.32 (Prepare Federal Tax Deposits) Using the amount of income tax withheld, the employer's FICA tax liability and unemployment tax liability, plus the appropriate forms, prepare Federal tax deposit with 100 percent accuracy on numerical data and in compliance with the law.

7.33 (Prepare Employer's Quarterly Federal Tax Returns) Given an adding machine or calculator, the amounts of total wages, income tax withheld, the employer's FICA tax liability, the federal tax deposits (Form 510) for the period, and the employer's quarterly tax return (Form 941); prepare the employer's quarterly federal tax return with 100 percent accuracy on numerical data and no errors in entries and in compliance with the law.

7.34 (Prepare Employer's Annual Reconciliation Reports of Income Tax Withheld) Given the necessary completed withholding statement and necessary forms, complete the employer's annual reconciliation report of income tax withheld (#W-3).

7.35 (Prepare State Unemployment Tax Return) Given the employer's state unemployment tax liability and the appropriate form, prepare the state unemployment tax return with 100 percent accuracy on numerical data and in compliance with the state law.

7.36 (Replacing and Storing Supplies) Given a typewriter, eraser, a list of items to be purchased and a list of items to be shipped, plus three purchase order forms, and three shipping order forms, type correctly three shipping orders for equipment and supplies, plus three purchase orders for items of office supplies and equipment from three different suppliers with 100 percent accuracy in items and information listed. Proper forms with legible carbon copies must be used; neatness and organization apply.

7.37 (Take Inventory) Given a set of prepared inventory cards, blank inventory cards, and equipment in the immediate office, verify the accuracy of the inventory cards and make necessary changes with 100 percent accuracy and complete new inventory cards neatly and legibly.

7.38 (Word Processing - Terminology) Given a list of 40 terms, 15 of which are related to word processing and have spelling errors, demonstrate the ability to correctly identify, spell, and define those 15 related to word processing with an accuracy of 80 percent.

7.39 (Employing Word Processing Concepts in an Office) Given a hypothetical traditional office situation, demonstrate a conceptual knowledge of structuring a word processing system by devising a plan, to the satisfaction of the instructor, to convert the traditional office to word processing structured system. The plan must appear to implement the concept and be workable.

7.40 (Proofread and Revise Documents - Word Processing) Given a typewriter (power typewriter or word processing machine, if possible) and three rough drafts (or prerecorded on word processing machine) documents containing errors, demonstrate the ability to locate and correct errors by producing three error free documents (or playbacks). The documents must be mailable copy produced within designated time limits.

7.41 (Use Power Typewriter) Given a power typewriter (word processing machine) and a document containing all numbers, symbols, alphabetic letters, and applications requiring use of all codes, demonstrate good manipulative techniques while recording, correcting errors, and playing back copy. Mailable copy must be produced in acceptable time limits while demonstrating good manipulative techniques.

7.42 (Data Processing - Terminology) Given a list of 40 terms, 20 of which are related to data processing and have spelling errors, demonstrate the ability to correctly identify, spell, and define those 20 related to data processing with an accuracy of 80 percent.

7.43 (Recognize Computer Concepts - Data Processing) Given a list of data processing machines, identify the use of each, verbally or by other means if directed by the teacher, with 100 percent accuracy in acceptable time limits as determined by problem complexity.

Given a problem to process through a computer, construct a flow chart using the correct symbolism and label each step appropriately with 100 percent accuracy in acceptable time limits as determined by problem complexity.

7.44 (Locate Employment Opportunities) Given job placement information such as newspaper ads and personal contacts, list a minimum of ten specific Business and Office Education related jobs in the community. One week will be allowed to complete the tasks.

7.45 (Prepare Resume) Given examples of suitable resume/personal data sheets, prepare and type a personal resume on paper acceptable to the instructor with all errors acceptably corrected.

7.46 (Compose Follow-Up Letter) Given a case situation by the instructor or from the textbook, compose and type a follow-up letter appropriate to the job application or interview situation and in mailable form.

7.47 (Compose Application Letter) Given a newspaper ad for a business position, compose a letter of application. The letter must be mailable and include necessary personal information.

7.48 (Complete Application Form) Given a job application form blank, complete the form with all information accurate, neatly typed and aligned in form blanks.

7.49 (Interview for Job) Given instructions on how to interview for a job, a job interview checklist, and a mock job interview, complete a job interview to the satisfaction of the instructor.

OFFICE PROCEDURES

(SECONDARY LEVEL)

MODULE 7.0 OFFICE PROCEDURES

TASK 7.01 PROPER TECHNIQUES FOR GOOD BODY CARE - PERSONAL DEVELOPMENT

PERFORMANCE OBJECTIVE:

Given instruction, the learner will show evidence of being well-groomed in relationship to physical cleanliness, properly kept nails, well-kept hair and will show knowledge of good eating habits and requirements for good physical fitness. (Instructor's evaluation.)

PERFORMANCE ACTIONS:

7.0101 Keep physically clean.

7.0102 Care for nails.

7.0103 Care for hair.

7.0104 Select a proper diet.

7.0105 Maintain good physical fitness.

SUGGESTED INSTRUCTION TIME: 1-3 Hours

PERFORMANCE STANDARDS:

- Evidence of proper techniques for good body care including grooming, cleanliness, good eating habits, and physical fitness requirements to the satisfaction of the instructor.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.02 DRESS/GROOMING - PERSONAL DEVELOPMENT

PERFORMANCE OBJECTIVE:

Given instruction concerning assessment of personality, grooming, and work habits for successful employment, demonstrate how to dress appropriately and maintain neat, well-groomed appearance to the satisfaction of the instructor.

PERFORMANCE ACTIONS:

7.0201 Have clean clothing.

7.0202 Select appropriate clothing.

7.0203 Care for clothing.

7.0204 Use appropriate accessories.

7.0205 Practice good grooming in personal care.

SUGGESTED INSTRUCTION TIME: 1-3 Hours

PERFORMANCE STANDARDS:

- Demonstrate the ability to maintain a neat, well-groomed appearance by having clean, appropriate (for business), and well-kept clothing and accessories to the instructor's satisfaction.

MODULE	7.0	OFFICE PROCEDURES
TASK	7.03	DISPLAY PHYSICAL POISE IN PERSONAL DEVELOPMENT

PERFORMANCE OBJECTIVE:

Given instruction, display physical poise in the business setting to the instructor's satisfaction.

PERFORMANCE ACTIONS:

7.0301 Standing: (a) Basic stance; (b) Legs classified; (c) The pedestal stance; (d) Five hand-hip positions; (e) Additional hand positions; (f) Three rules for beautiful hands in standing.

7.0302 Walking: (a) The five step practice walk; (b) Variation for five step practice walk; (c) Techniques for a graceful walk; (d) Hand coordination with the feet.

7.0303 Sitting: (a) The "T" sitting position; (b) The "S" sitting position; (c) Sitting pretty principles for the feet, legs, and hands.

7.0304 Social Posture: (a) The arch; (b) Greeting people; (c) The handshake; (d) The open doorway; (e) The picture pose; (f) Leaving through an open doorway; (g) The close doorway; (h) Crossing in front of and standing before a group.

SUGGESTED INSTRUCTION TIME: 1-3 Hours

PERFORMANCE STANDARDS:

- Display physical poise to the instructor's satisfaction.

RELATED TECHNICAL INFORMATION:

- Etiquette rules for entering and leaving a room.
- Etiquette rules for entering and leaving a car.
- Basic stance positions.

MODULE	7.0	OFFICE PROCEDURES
TASK	7.04	HUMAN RELATIONS SKILLS IN PERSONAL DEVELOPMENT

PERFORMANCE OBJECTIVE:

Given an introduction to practice of good human relations skills, demonstrate how to successfully interact with fellow workers, superiors, and the public and practice concepts of good human relations.

PERFORMANCE ACTIONS:

7.0401 Respect ideas of others.

7.0402 Respect ambition of others.

7.0403 Be thoughtful.

7.0404 Greet people warmly.

7.0405 Practice office etiquette.

7.0406 Be polite under stress.

7.0407 Be loyal to employer and company.

7.0408 Keep confidences.

SUGGESTED INSTRUCTION TIME: 2-3 Hours

PERFORMANCE STANDARDS:

- Teacher's satisfaction.
- Checklist for role playing situations or observations by teacher.

MODULE	7.0	OFFICE PROCEDURES
TASK	7.05	DISPLAY POSITIVE ATTITUDE TOWARD WORK - PERSONAL DEVELOPMENT

PERFORMANCE OBJECTIVE:

Given the daily classroom training situation, a part-time work situation, or simulations, display a proper attitude toward work as defined by the teacher or text.

PERFORMANCE ACTIONS:

7.0501 Report to work on time.

7.0502 Report to work consistently.

7.0503 Be ready to work upon arrival at work station.

7.0504 Be conscientious.

7.0505 Be pleasant.

7.0506 Be tactful in comments.

7.0507 Be cooperative.

7.0508 Accept constructive criticism.

7.0509 Accept responsibility.

7.0510 Fulfill job performance requirements.

7.0511 Demonstrate interest in job.

SUGGESTED INSTRUCTION TIME: 1-3 Hours

PERFORMANCE STANDARDS:

- Display a proper attitude toward work (as defined by the instructor of text). Demonstrate the ability to be conscientious, pleasant, tactful and cooperative. Display the ability to accept constructive criticism gracefully, fulfill job performance requirements, be reliable, and accept responsibility.
- Standard: Teacher's satisfaction.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.06 SET UP WORK STATION

PERFORMANCE OBJECTIVE:

Given a desk with normal secretarial equipment and items, arrange the work station to present a neat, orderly appearance acceptable to the instructor.

PERFORMANCE ACTIONS:

7.0601 Perform duties as situations demand.

7.0602 Maintain an orderly desk and supply area.

7.0603 Keep equipment clean and in running order.

SUGGESTED INSTRUCTION TIME: 2 Hours

PERFORMANCE STANDARDS:

- Ability to perform designated tasks in an organized manner.
- Follows manufacturer's specifications in setting up equipment and in care of machines.
- Maintains a neat, orderly work area.

MODULE	7.0	OFFICE PROCEDURES
TASK	7.07	PLANNING WORK AND ESTABLISHING PRIORITIES

PERFORMANCE OBJECTIVE:

Given a number of clerical tasks which are to be performed and completed at various times during a work week, plan the work and complete the necessary tasks so that all deadlines are met and each task is satisfactorily completed. A checklist will be used to rate performance. All items of the checklist must receive an acceptable rating.

PERFORMANCE ACTIONS:

7.0701 Examine tasks to be performed.

7.0702 Assign work priorities considering:

a. Due date
b. Logical progression of tasks
c. Complexity of work

7.0703 Allow adequate time for the completion of each task.

7.0704 Allow time for necessary routine duties.

7.0705 Gather necessary supplies and information for completing each task.

7.0706 Complete tasks, meeting all deadlines.

SUGGESTED INSTRUCTION TIME: 5 Hours

PERFORMANCE STANDARDS:

- 100 percent of checklist must receive acceptable rating.

CHECKLIST
(All items must receive acceptable rating)

1. Assigned proper priorities to work.
2. Organized work in logical sequence.
3. Allowed adequate time for completion of tasks.
4. Located necessary supplies and information.
5. Met all deadlines.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.08 RECOMMEND APPROPRIATE TYPES OF OFFICE FURNITURE AND EQUIPMENT

PERFORMANCE OBJECTIVE:

Given two office situations in which furnishings are to be planned within a given budget and in which an efficient and attractive layout is required, determine the required furnishings and draw a suggested layout on graph paper. Performance will be rated on the following criteria:

1. selection must be within budget
2. selection must be appropriate to type of office
3. suggested layout must be efficient and attractive

TASKS PERFORMED:

7.0801 Determine needed furnishings.

7.0802 Determine usefulness of present furnishings where appropriate.

7.0803 Determine sources of supply.

7.0804 Price needed furnishings.

7.0805 Assess needed furnishings in accordance with budget.

7.0806 Make tentative selection of furnishings.

7.0807 Plan layout of furnishings.

7.0808 Finalize planned purchases and layout.

SUGGESTED INSTRUCTION TIME: 2 Hours

PERFORMANCE STANDARDS:

- Student will determine furnishings and plot a suggested layout on graph paper given a case situation, catalogs, price lists, and a budget for office furnishings.

MODULE	7.0	OFFICE PROCEDURES
TASK	7.09	DEMONSTRATE BASIC TYPEWRITER FUNCTIONS

PERFORMANCE OBJECTIVE:

Given an electric (or manual) typewriter, demonstrate basic typewriter functions appropriately. The functions should include centering, tabulating, underlining, aligning on prepared forms, addressing large and small envelopes, and interpreting proofreader's marks.

PERFORMANCE ACTIONS:

7.0901 Assemble necessary supplies.

7.0902 Given individual or a combined exercise, demonstrate the following typewriting functions:

a. Centering
b. Tabulating
c. Underlining

7.0903 Given prepared forms, demonstrate aligning typing onto forms.

7.0904 Demonstrate proper addressing of small and large envelopes.

7.0905 Interpret proofreader's marks in typing.

SUGGESTED INSTRUCTION TIME: 5 Hours

PERFORMANCE STANDARDS:

- Demonstrate centering, tabulating, and underlining operations of typing, typing prepared forms, typing small and large envelopes, and interpreting proofreader's marks and basic typewriting to the satisfaction of the instructor.

RELATED TECHNICAL INFORMATION:

- Basic typewriting.
- U. S. Postal Service Regulations (Addressing).
- Proofreader's marks.
- Mailable standards.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.10 LETTER PLACEMENT AND STYLES

PERFORMANCE OBJECTIVE:

Given three edited, rough-draft letters, required supplies, plus instructions for typing any special features: type the letters in the format specified by the instructor, making one carbon copy. A checklist will be used to rate performance. All applicable items must receive an acceptable rating on the checklist.

PERFORMANCE ACTIONS:

7.1001 Select appropriate supplies.

7.1002 Make necessary typewriter adjustments:

a. Set correct margins for letter length.
b. Adjust line-space regulator.
c. Set appropriate tabs.

7.1003 Assemble carbon pack and insert into typewriter.

7.1004 Type each letter in specified format.

7.1005 Proofread carefully, correcting all errors, before removing each letter from the typewriter.

SUGGESTED INSTRUCTION TIME: 5 Hours

PERFORMANCE STANDARDS:

- Type required letters in format specified making one carbon copy and receiving an acceptable rating on all applicable items of the rating checklist.

RELATED TECHNICAL INFORMATION:

- Capitalization, punctuation, grammer, and word-division rules.

CHECKLIST

(All applicable items must receive an acceptable rating on checklist.)

1. Used specific format.
2. Balanced copy vertically.
3. Balanced copy horizontally.
4. Did not exceed specified time limit (SUGGESTED: 10 minutes for short letter, 20 minutes for medium letter, and 30 minutes for long letter.)

CHECKLIST (continued)

5. Used appropriate type of punctuation (open or mixed).
6. Corrected all errors neatly on original copy.
7. Corrected all errors neatly on carbon copy, with no smudges.
8. Inserted carbon pack correctly, without wrinkling carbon paper.
9. Typed any special features correctly.

MODULE	7.0	OFFICE PROCEDURES
TASK	7.11	TYPE CORRESPONDENCE OR REPORTS FROM ROUGH DRAFTS

PERFORMANCE OBJECTIVE:

Given at least three edited, rough-draft pieces of correspondence or reports, instructions for typing, a typewriter, and typing paper, type the correspondence or reports according to instructions making one carbon copy. The correspondence must be in mailable form so that: (1) the copy contains no typographical errors, (2) format and style conform to office policy, (3) the copy is legible, and (4) no smudges or extraneous marks are present.

PERFORMANCE ACTIONS:

7.1101 Review instructions and correspondence or report draft.

7.1102 Make typewriter adjustments.

7.1103 Type the correspondence.

7.1104 Proofread, correcting all errors neatly.

SUGGESTED INSTRUCTION TIME: 10 Hours

PERFORMANCE STANDARDS:

- 100 percent accuracy with 95 percent neatness.
- Mailable product to instructor's or stated standards.

RELATED TECHNICAL INFORMATION:

- Mailable standards.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.12 BUSINESS COMPOSITION

PERFORMANCE OBJECTIVE:

Given business situations requiring responses by correspondence, the student will compose business compositions.

PERFORMANCE ACTIONS:

7.1201 Given instructions and case situations, and following examples in the text, Secretarial Office Procedures*, students will compose and prepare in final form the following:

a. Letter of acknowledgement
b. Appointment
c. Make Reservations
d. Regarding meetings
e. Letters of transmittal
f. Follow-up letters
g. Thank you letters
h. Remittance letters
i. Letters of inquiry
j. Placing orders

7.1202 Compose a form letter to be used to convey message to several individuals.

7.1203 Letters to prospective customers and requesting references are composed.

SUGGESTED INSTRUCTION TIME: 5 Hours

PERFORMANCE STANDARDS:

- Correspondence material must be mailable copies with 100 percent accuracy.

RELATED TECHNICAL INFORMATION:

- Proper use of dictionary, thesaurus, reference manuals.

*Teacher may substitute another text or may furnish own examples.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.13 TYPE PRE-PRINTED BUSINESS FORMS

PERFORMANCE OBJECTIVE:

Given four pre-printed business forms that require typing on lines, in blocked-in areas (boxes), after guide words, or in columns (such as purchase order, purchase requisition, invoice, acknowledgement, check, form letter, payroll time sheet, business contract, telegram, personnel form, or voucher), plus the necessary information for completing the forms, type the information onto the forms in the appropriate spaces. Placement of copy must be consistent and evenly aligned, with all errors neatly corrected.

PERFORMANCE ACTIONS:

7.1301 Select appropriate supplies.

7.1302 Make necessary typewriter adjustments:

a. Set appropriate margins
b. Adjust line space regulator
c. Set appropriate tabs

7.1303 Insert the form and align properly.

7.1304 Type information onto the form.

7.1305 Proofread carefully, correcting all errors, before removing the copy from the typewriter.

SUGGESTED INSTRUCTION TIME: 10 Hours

PERFORMANCE STANDARDS:

- Produce acceptable typed business form, supply requisition for example, in 30 minutes with 100 percent accuracy and 90 percent neatness. The length of time allowed for production will be determined by the instructor and based on the type of form used and the extent of information recorded. The finished product must be mailable copy based upon the instructor's eye judgement.

RELATED TECHNICAL INFORMATION:

- Operation of typewriter margin, space regulator, and tab adjustments.
- Mailable copy standards.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.14 MACHINE TRANSCRIPTION

PERFORMANCE OBJECTIVE:

Given a transcription machine, supporting supplies, a typewriter, prerecorded message, type the correspondence in mailable copy with 100 percent accuracy with carbon copies as required, following dictated instructions.

PERFORMANCE ACTIONS:

7.1401 Assemble supplies and adjust equipment.

7.1402 Turn on transcription and be sure dictated instructions are understood fully.

7.1403 Adjust typewriter settings.

7.1404 Type dictated material with 100 percent accuracy in mailable copy with carbon copies as required.

7.1405 Proofread the material or correspondence, correcting all errors.

7.1406 Return the completed task to the originator, unless dictated instructions indicate other action.

SUGGESTED INSTRUCTION TIME: 8 Hours

PERFORMANCE STANDARDS:

- Type mailable correspondence with carbon copies as required, following dictated instructions and message, with 100 percent accuracy.

RELATED TECHNICAL INFORMATION:

- Capitalization, punctuation, grammar, word-division rules.
- Mailable copy standards.
- Manufacturer's instruction manual: Transcription machine.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.15 ORAL COMMUNICATIONS IN BUSINESS

PERFORMANCE OBJECTIVE:

Given a simulated office situation or role play by the instructor, demonstrate clear, precise, and complete business speech to communicate information, convey instructions, or transmit decisions. Business speech should be slightly more formal than that used with close friends and family and has a specific purpose. Accuracy: 100 percent.

PERFORMANCE ACTIONS:

7.1501 Respond or speak to another person, in person or by telephone in a clear and audible manner so that information is transmitted with 100 percent accuracy.

7.1502 Demonstrate proper pronunciation of a given list of typical business words provided by the instructor or text to the satisfaction of the instructor.

7.1503 Demonstrate how to deal with words that cannot be pronounced or that are unknown or that are colloquial.

7.1504 Demonstrate the use of correct grammar with selected subject and verb, pronoun, adjective, and irregular verb and tense situations given by the instructor or text.

7.1505 Use proper tone of voice (modulated voice).

7.1506 State how courtesy may be observed or demonstrated in the office oral communications situation. Be tactful.

SUGGESTED INSTRUCTION TIME: 4 Hours

PERFORMANCE STANDARDS:

- Demonstrate the ability to practice acceptable business communications to the satisfaction of the instructor.
- 100 percent accuracy in content communications.

RELATED TECHNICAL INFORMATION:

- Rules of etiquette.
- Barriers to communications.
- Psychology of human communications.
- Body language.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.16 PERFORM RECEPTIONIST DUTIES

PERFORMANCE OBJECTIVE:

Given a receptionist assignment, work station and situation calling for action, demonstrate the ability to perform receptionist duties, meeting standards of personality, courtesy, poise, speaking clearly, taking names accurately, and giving accurate information acceptable to the instructor.

PERFORMANCE ACTIONS:

7.1601 Greet callers.

7.1602 Display proper speech habits.

7.1603 Maintain a proper appearance.

7.1604 Handle incoming phone calls and record outgoing calls.

7.1605 Give directions clearly to different locations.

7.1606 Perform general office duties.

7.1607 Handle difficult callers.

7.1608 Work desk type switchboard.

SUGGESTED INSTRUCTION TIME: 4 Hours

RELATED TECHNICAL INFORMATION:

- Good personal appearance.

PERFORMANCE STANDARDS:

- Announce visitors to appropriate person by name and firm or title with 100 percent accuracy.
- Demonstrate courteous and proper telephone procedures.
- Give sample directions to a specific office accurately.
- Maintain person and work area in a neat, organized manner.
- Demonstrate courteous, pleasant, and helpful attitude with visitors.

CHECKLIST
GREETING VISITORS

1. Greeted visitors pleasantly.
2. Was courteous.

Checklist (continued)

3. Was helpful.
4. Used visitor's name where appropriate.
5. Put visitor at ease.
6. Used suitable vocabulary.
7. Used pleasant tone of voice.
8. Showed appropriate interest in the visitor and the situation.
9. Gave clear directions.
10. Gave clear information.
11. Maintained company policy regarding visitors.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.17 EFFECTIVE TELEPHONE TECHNIQUES

PERFORMANCE OBJECTIVE:

Given a telephone, note pad, pencil, simulated telephone exercises by the instructor, display a pleasing voice control, courteous telephone manner, and proper telephone procedures in handling a variety of business incoming and outgoing telephone calls and write two telephone messages received by telephone with 100 percent accuracy, neatly and legibly, and forward the messages to another person.

PERFORMANCE ACTIONS:

7.1701 Given a list of names, pronounce the names over the telephone clearly in a pleasing voice.

7.1702 In a telephone conversation, be able to select a list of responses that reflect a courteous attitude.

7.1703 Display proper telephone procedures in planning and placing business telephone calls, including:

a. Planning the call
b. Placing the call
c. Developing the call
d. Terminating the call

7.1704 Display proper telephone procedures in answering business calls, including:

a. Answer a call
b. Identify self
c. Locate the proper person called
d. Take a message
e. Transfer a call
f. Screen a call
g. Terminate the call

7.1705 Identify information found in the telephone directory.

7.1706 Use the Cross-reference directory for telephone information.

7.1707 Distinguish and handle the different types of calls that occur in the business office.

a. Local calls
b. Long distant calls
c. Difficult callers

PERFORMANCE ACTIONS (continued)

7.1708 Receive information over the telephone and forward it in written message form to another person with 100 percent accuracy in a neat and legible manner.

7.1709 Properly use directory assistance (information) of the telephone exchange.

SUGGESTED INSTRUCTION TIME: 3 Hours

PERFORMANCE STANDARDS:

- Receive and relay a telephone message with 100 percent accuracy.
- Locate and relay telephone information from directories or other sources with 100 percent accuracy.
- Demonstrate correct business telephone procedures.

RELATED TECHNICAL INFORMATION:

- Telephone Directory contents, including the Yellow Pages.
- Cross-Reference Directory use (Possibly City Directory use).
- Southern Bell Telephone Company: Consultants and source of training aids and materials.

CHECKLISTS

- See accompanying checklists for answering the telephone and placing telephone calls.

ANSWERING THE TELEPHONE

1. Beginning of the Call

   a. Answered promptly and pleasantly.
   b. Gave proper identification.

2. Developing the Call

   a. Was attentive; displayed personal interest.
   b. Used good judgement in deciding how to handle the situation.
   c. Was alert to opportunities to be of assistance (transfer, call-back, message).
   d. Transferred call properly.
   e. Volunteered helpful information.
   f. Gave explanations effectively.
   g. Made inquiries tactfully.
   h. Located called party.

ANSWERING THE TELEPHONE (continued)

3. Taking Messages

a. Was prepared to take a message.
b. Recorded necessary information carefully.
c. Verified information (spelling, figures, etc.).
d. Used proper techniques when necessary to leave the line (such as correct use of hold button).
e. Distributed telephone messages.

4. Closing of Call

a. Left a pleasing impression at the close of the call.
b. Was certain that the conversation had been completed before replacing the receiver.

5. Voice Personality

a. Spoke distinctly, directly into the mouthpiece.
b. Used correct grammar; avoided slang.
c. Injected polite expressions (please, thank you).
d. Reflected a friendly, sincere manner.
e. Acted with poise and confidence.
f. Gave the caller a feeling of assurance.
g. Represented the business courteously and efficiently.

PLACE TELEPHONE CALLS

1. Beginning of the Call

a. Verified the telephone number before calling.
b. Selected proper trunk line (where appropriate).
c. Correct telephone number was dialed.
d. Allowed sufficient ringing time.
e. Correct party reached.
f. Gave identification promptly (gave introduction).

2. Developing the Call

a. Had anticipated points to be covered and was prepared with necessary references.
b. Explained the nature of the call clearly and concisely.
c. Gave information to be recorded slowly and distinctly.
d. Confirmed information to assure mutual understanding.
e. Expressed appreciation.
f. Accomplished the purpose of the call.

PLACE TELEPHONE CALLS (continued)

3. Closing the Call

   a. Directed the conversation to a close in a prompt, yet tactful manner.
   b. Replaced the receiver gently after closing remarks.
   c. Made a record of long distance calls.

4. Voice Personality

   a. Spoke directly into the mouthpiece, in a distinct voice.
   b. Used correct grammar, avoided using slang.
   c. Was courteous.
   d. Created a pleasing impression.

MODULE	7.0	OFFICE PROCEDURES
TASK	7.18	MAILING AND SHIPPING SERVICES

PERFORMANCE OBJECTIVE:

Given a variety of incoming and outgoing mail items, demonstrate the ability to process both incoming and outgoing mail, including letters and packages, meeting current postal regulations for outgoing mail and sorting, opening, and routing official mail correctly.

TASKS PERFORMED:

7.1801 Uses the ZIP Code Directory.

7.1802 Establish and review incoming and outgoing mail procedures.

7.1803 Forwards mail.

7.1804 Receives and places telegrams and cablegrams.

7.1805 Processes insured mail, registered mail, and certified mail.

7.1806 Weighs items and uses correct postage.

7.1807 Dates and stamps incoming mail.

7.1808 Routes mail.

7.1809 Wraps, ties, and labels packages.

7.1810 Uses the proper procedures for mailing by United Parcel Service and other private carriers.

SUGGESTED INSTRUCTION TIME: 5 Hours

RELATED TECHNICAL INFORMATION:

- Current US Postal Service regulations.
- Current United Parcel Service requirements.

PERFORMANCE STANDARDS:

- Ability to identify and list the different major mail classifications.
- Ability to sort incoming mail according to personal and official, to prepare official executive correspondence for scrutiny by the executive, and route appropriate items to the staff.
- Prepare difference classifications of mail for mailing.
- Uses postal scale to determine postage, required for specific mail item.
- Uses ZIP Code Directory.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.19 REPROGRAPHICS

PERFORMANCE OBJECTIVE:

Given stencils, masters, and documents for duplicating, demonstrate the ability to reproduce on ink duplicator, fluid duplicator and photocopy machine, a multi-page report, collate copies following manufacturer's instructions to 100 percent accuracy and to the instructor's satisfaction.

PERFORMANCE ACTIONS:

7.1901 A report of 2 or 3 pages should include a manuscript and a financial form and will be given to the student to type first in rough draft, then proofread, and typed on stencils, and make 10 copies of each page on the ink duplicator. With instruction given to the student to collate pages, the students will place pages of the report in correct order and bind (staple to make booklet.)

7.1902 Student will be given a one page form letter to type on a master and run five copies. (Material to be typed should be meaningful, e.g., related to duplication or some other phase of secretarial work and not mearly an exercise.)

7.1903 Given a one-page document, the student will prepare a rough draft and final copy appropriate for photocopy. Student should be aware that errors tend to show in photocopy if not corrected carefully and properly.

SUGGESTED INSTRUCTION TIME: 3 Hours

PERFORMANCE STANDARD:

- Clear, acceptable reproduction accomplished in specified time sequence.

RELATED TECHNICAL INFORMATION:

- Manufacturer's instruction manual.

NOTE: Performance steps in operating machines will be determined by the type of machine being used. Performance actions to be determined by manufacturer's instruction manual and teacher's instructions.

MODULE	7.0	OFFICE PROCEDURES
TASK	7.20	COLLATE MATERIALS

PERFORMANCE OBJECTIVE:

Given an automatic collator and instructions concerning its operation a master set, and materials; collate the materials so that each collated set is in the order corresponding with the master set.

Given materials to collate by hand, collate the material so each collated set is in the order corresponding with the master set.

PERFORMANCE ACTIONS:

7.2001	Load individual stacks of paper into separate compartments.
7.2002	Set copy counter.
7.2003	Make necessary adjustments to collator.
7.2004	Check the first collated set.
7.2005	Remove collated sets when job is completed.
7.2006	Discard unused materials.

NOTE: Follow directions of teacher to manually collate material.

SUGGESTED INSTRUCTION TIME: 1 Hour

PERFORMANCE STANDARDS:

- 100 percent accuracy--Each collated set must correspond with the master set.

RELATED TECHINCAL INFORMATION:

- Manufacturer's instruction manual.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.21 ESTABLISH A FILING SYSTEM

PERFORMANCE OBJECTIVE:

Given two case situations to establish filing systems, establish filing systems that best meet the needs of each situation. Record your proposed plans. Performance will be evaluated on completeness and appropriateness as judged by the instructor.

PERFORMANCE ACTIONS:

7.2101 Determine business needs for management of records.

7.2102 Evaluate present method of preserving records.

7.2103 Determine an appropriate filing system (i.e., alphabetic, numeric, subject, or geographic):

a. Alphabetic
   1. Index a list of names.
   2. Arrange alphabetically indexed names.
b. Numeric:
   Arrange items according to numeric system.
c. Subject:
   Alphabetize a group of records by topics.
d. Geographic:
   Arrange names according to geographic location.

7.2104 Write a filing plan.

7.2105 List reasons for setting up a filing system for a business.

7.2106 List the types of records that must be filed.

7.2107 Select the supplies and equipment to be used in each major system of filing and state the advantages of each system.

7.2108 Describe how records should be destroyed.

SUGGESTED INSTRUCTION TIME: 10 Hours

PERFORMANCE STANDARDS:

- (Performance guide for each system of filing: Alphabetic, Numeric, Subject, Geographic)
  a. Collect items to be filed
  b. Inspect documents
  c. Index and code documents

MODULE	7.0	OFFICE PROCEDURES
TASK	7.21	ESTABLISH A FILING SYSTEM

PERFORMANCE STANDARDS (continued)

d. Cross-reference where appropriate
e. Sort
f. File

- Standard: Instructor will provide student with file folders and 25 documents to be filed alphabetically, numerically, etc. Performance must be to the satisfaction of the instructor.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.22 RETRIEVE MATERIALS FROM FILES

PERFORMANCE OBJECTIVE:

Given ten requests for information from the files, obtain the necessary documents and give requested information to the instructor in written form. Performance will be based on the accurate retrieval of the requested information with at least nine of the ten requests accurately relayed to the instructor.

PERFORMANCE ACTIONS:

7.2201 Sort requests.

7.2202 Locate file folder for each request, one at a time.

a. Abstract requested information if appropriate
b. Record abstract information
c. Pull desired documents where appropriate
d. Record the removal from the file

7.2203 Copy material where appropriate.

7.2204 Handle confidential material in appropriate manner.

a. Only give to qualified personnel
b. Do not discuss contents

7.2205 Give information to persons requesting the data.

SUGGESTED INSTRUCTIONAL TIME: 2 Hours

PERFORMANCE STANDARDS:

- Using the information requests provided by the instructor, go to the files and retrieve and desired information with 90 percent accuracy.

MODULE	7.0	OFFICE PROCEDURES
TASK	7.23	CROSS-REFERENCE DOCUMENTS

PERFORMANCE OBJECTIVE:

Given ten documents, some of which should be cross-referenced, accurately prepare cross-reference sheets for appropriate documents to the satisfaction of the instructor.

PERFORMANCE ACTIONS:

7.2301 Determine which documents need cross-referencing.

7.2302 Complete cross-reference sheets.

a. Name or subject matter
b. Date
c. Brief description of content of original document
d. Location of original document

SUGGESTED INSTRUCTION TIME: 2 Hours

PERFORMANCE STANDARDS:

- Cross-reference appropriate documents from material provided by the instructor to the instructor's satisfaction.

MODULE	7.0	OFFICE PROCEDURES
TASK	7.24	KEEP TICKLER OR FOLLOW-UP FILES

PERFORMANCE OBJECTIVE:

Given a tickler file, transactions requiring the use of the file, and supplies to complete required tasks, maintain the tickler file for one week. A checklist will be used to rate performance and all items must receive an acceptable rating.

PERFORMANCE ACTIONS:

7.2401 Make cards for tickler file.

7.2402 File follow-up cards according to date.

7.2403 Check each day for items to be done.

7.2404 Complete necessary tasks or remind the appropriate person of the task to be performed.

SUGGESTED INSTRUCTION TIME: 2 Hours

PERFORMANCE STANDARDS:

- With an accuracy of 95 percent, maintain a tickler file for one week, making cards, filing follow-up cards, checking each day for items to be done, and completing necessary tasks or reminding the appropriate person of the task.

CHECKLIST

- The instructor-developed checklist will be based on the performance actions.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.25 TRAVEL ARRANGEMENTS

PERFORMANCE OBJECTIVE:

Given a case situation to plan and schedule a business trip for the employer, prepare an itinerary and make the necessary travel arrangements. A checklist will be used to rate performance and at least nine of the ten items must be rated acceptable.

PERFORMANCE ACTIONS:

7.2501 Gather information about the trip such as:

a. Date of departure and return
b. Preferred mode of transportation
c. Preferred accommodations

7.2502 Gather timetables and hotel/motel guides.

7.2503 Make necessary reservations.

7.2504 Make appropriate appointments.

7.2505 Confirm reservations and appointments.

7.2506 Prepare copies of the itinerary for office and traveler.

a. Prepare expense report, if required

SUGGESTED INSTRUCTION TIME: 5 Hours

PERFORMANCE STANDARDS:

- Plan and prepare an itinerary for a business trip using the case situation provided by the instructor with 100 percent accuracy in timetable and 85 percent accuracy in supporting material.

RELATED TECHNICAL INFORMATION:

- Official Airline Guide
- The Hotel and Motel Red Book

CHECKLIST

(At least nine of ten items must check acceptable.)

1. Planned itinerary.
2. Planned trip to avoid long layovers.
3. Planned sufficient time for travel.*

RELATED TECHNICAL INFORMATION (continued)

4. Planned sufficient time for engagements.*
5. Planned time for meals.
6. Made travel arrangements, considering employer's preferences.
7. Made necessary transportation and lodging reservations.*
8. Confirmed reservations.
9. Scheduled meetings where appropriate.*
10. Prepared copy of itinerary for employer and office.

*Must be rated acceptable for satisfactory performance.

MODULE	7.0	OFFICE PROCEDURES
TASK	7.26	WRITE CHECKS

PERFORMANCE OBJECTIVE:

Given check records, blank check forms, and five bills to be paid, complete the check records and write the checks. All items must be accurately and legibly completed on checks and check records for acceptable performance.

PERFORMANCE ACTIONS:

7.2601 Keep check records. (Complete check record.)

a. Fill in check number, amount, date, payee, and explanation, if necessary
b. Calculate new cash balance

7.2602 Write checks.

a. Fill in check number
b. Fill in date
c. Write name of payee
d. Write in numerals
e. Write amount in words or use machine to imprint amount
f. Sign where appropriate

SUGGESTED INSTRUCTION TIME: 2 Hours

PERFORMANCE STANDARDS:

- Using the blank checks and other resources provided, complete the check records and write the necessary checks with 100 percent accuracy.
- Entries must be legible as well as accurate. Neatness applies.

MODULE	7.0	OFFICE PROCEDURES
TASK	7.27	ENDORSE CHECKS

PERFORMANCE OBJECTIVE:

Given three checks and information on how the checks will be cashed or deposited, endorse each check using the blank, restrictive or full method of endorsement, as appropriate for the situation. Each endorsement must be in accordance with the illustrated endorsements and appropriate for the situation.

PERFORMANCE ACTIONS:

7.2701 Check spelling of payee.

7.2702 Choose appropriate endorsement.

7.2703 Endorse check.

SUGGESTED INSTRUCTION TIME: 2 Hour

PERFORMANCE STANDARDS:

- Using the appropriate method, endorse each of three checks provided by the instructor with 100 percent accuracy.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.28 DEPOSIT CHECKS IN BANK

PERFORMANCE OBJECTIVE:

Given a bank deposit slip, five checks, and currency and coins (simulated money acceptable), prepare deposit slip and items for deposit with 100 percent accuracy and deposit in bank (or cashier's office).

PERFORMANCE ACTIONS:

7.2801 Separate checks from cash.

7.2802 Endorse checks.

7.2803 Count currency and coins.

7.2804 Enter checks on deposit slip by bank number.

7.2805 Enter amount of cash on deposit slip.

7.2806 Total deposit slip.

7.2807 Deposit.

SUGGESTED INSTRUCTION TIME: 2 Hours

PERFORMANCE STANDARDS:

- Using the material provided, prepare items for deposit and complete the deposit slip and deposit with 100 percent accuracy.

RELATED TECHNICAL INFORMATION:

- Endorse checks.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.29 RECONCILE BANK STATEMENTS

PERFORMANCE OBJECTIVE:

Given a bank statement, cancelled checks, previous monthly bank reconciliation statement, check stubs or check register, cash ledger sheet, and record of deposits, reconcile the bank statement. The balance in the cash account and the reconciled statement must be in agreement and represent the actual cash balance.

PERFORMANCE ACTION:

7.2901 Arrange cancelled checks in numerical order.

7.2902 Compare checks with stubs or check register to verify amounts.

7.2903 Check off checks listed as outstanding on prior reconciliation that cleared on the current statement.

7.2904 Check off current checks in checkbook or register that cleared on the current statement.

7.2905 Check off deposits listed as in transit on prior reconciliation that have been recorded on the current statement.

7.2906 Check off curent deposits that have been recorded on the current statement.

7.2907 Enter all debit memos, credit memos, bank charges and other adjustments on the checkbook or register and compute new totals.

7.2908 Prepare reconciliation form.

a. Enter date and account
b. Enter statement ending balance
c. List and total deposits not ticked off in deposit record
d. List and total all outstanding checks not checked off from prior reconciliation and current month register
e. Add b to c and subtract d to compute reconciled balance

7.2909 Prove reconciliation by adding prior months' reconciled balance to current month checks and charges.

MODULE	7.0	OFFICE PROCEDURES
TASK	7.29	RECONCILE BANK STATEMENTS

SUGGESTED INSTRUCTION TIME: 3 Hours

PERFORMANCE STANDARDS:

- Using the material provided by the instructor, reconcile the bank statement with 100 percent accuracy in calculations with legible entries.
- Uses proper steps in correct sequence.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.30 MAINTAIN A PETTY CASH ACCOUNT

PERFORMANCE OBJECTIVE:

Given a check, journal, and ledger, write a check for cash, journalize the entry, and post the entry to the ledger to establish the petty cash fund. Write vouchers for any money paid from the petty cash fund. Total all vouchers, compare the total of vouchers from petty cash to the beginning petty cash balance, write a check for the difference, journalize and post the entry. Accuracy should be 100 percent with the account in balance.

PERFORMANCE ACTIONS:

7.3001 Assemble materials and information.

7.3002 Write a check for cash.

7.3003 Journalize the entry.

7.3004 Post entry to ledger to establish petty cash fund.

7.3005 Write vouchers for any money paid from petty cash fund.

7.3006 Total vouchers.

7.3007 Compare the total of vouchers from petty cash to the beginning petty cash balance and write a check for the difference.

7.3008 Journalize and post the entry.

SUGGESTED INSTRUCTION TIME: 3 Hours

PERFORMANCE STANDARDS:

- 100 percent accuracy in calculations.
- Legible entries. Neatness applies.
- Appropriate information recorded with supporting vouchers according to standard bookkeeping procedures.
- Proper steps in correct sequence followed.
- Account to balance.

RELATED TECHNICAL INFORMATION:

- Use of vouchers and receipts.

ADDITIONAL ACTIONS:

- Replenish petty cash fund if required.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.31 PREPARE PAYROLL RECORDS

PERFORMANCE OBJECTIVE:

Given withholding tables, complete tables, complete time cards, payroll register, employees' payroll records, journal, and checkbook, prepare payroll records without errors in entries or computations.

PERFORMANCE ACTIONS:

7.3101 Assemble materials and information.

7.3102 Analyze time cards, matching cards with employee earning record.

7.3103 Compute gross pay.

7.3104 Determine withholding from tables.

7.3105 Compute FICA withholding for adjustments.

7.3106 Compute other withholdings or adjustments.

7.3107 Compute net pay.

7.3108 Enter data on employee earnings record and register.

7.3109 Foot and prove register. Journalize payroll register.

7.3110 Prepare check in amount of net pay.

7.3111 Issue check to employee.

SUGGESTED INSTRUCTION TIME: 5 Hours

PERFORMANCE STANDARDS:

- 100 percent accuracy in entries and computations.
- Proper steps in correct sequence followed.
- Legible entries.
- Neatness applies.

CHECKLIST
(Prepare Payroll Records)

1. Determined income tax deductions.
2. Determined FICA tax deductions.
3. Determined other tax deductions.
4. Determined other deductions.

CHECKLIST (continued)

5. Completed payroll register.
6. Completed employees' earnings records.
7. Verified payroll register and employees' earnings records.
8. Completed payroll checks.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.32 PREPARE FEDERAL TAX DEPOSITS

PERFORMANCE OBJECTIVE:

Using the amounts of income tax withheld, the employer's FICA tax liability and unemployment tax liability, plus the appropriate forms, prepare Federal tax deposit with 100 percent accuracy on numerical data and in compliance with the law.

PERFORMANCE ACTIONS:

7.3201 Determine the amount of the deposit according to instructions with Federal tax deposit.

7.3202 Record amount of deposit on card.

SUGGESTED INSTRUCTION TIME: 5 Hours

PERFORMANCE STANDARDS:

- Using the materials provided by the instructor. complete the Federal tax deposits with 100 percent accuracy in computations and in compliance with the law.

RELATED TECHNICAL INFORMATION:

- FICA tax.
- Unemployment tax.
- Current Federal Government Tax Regulations.

SUGGESTED REFERENCES:*

Tax Guide for Small Businesses, Publication 334, Internal Revenue Service, Washington, DC: US Government Printing Office, 1980, (Revised October, 1981).

Employer's Tax Guide, Publication 15 - Circular E, Internal Revenue Service, Washington, DC: US Government Printing Office, 1980, (Revised October, 1981).

Tax Withholding and Estimated Tax, Publication 505, Internal Revenue Service, Washington, DC: US Government Printing Office, 1980, (Revised October, 1981).

*Current tax information should be used for reference and instruction.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.33 PREPARE EMPLOYER'S QUARTERLY FEDERAL TAX RETURNS (FORM 941)

PERFORMANCE OBJECTIVE:

Given an adding machine or calculator, the amounts of total wages, income tax withheld, the employer's FICA tax liability, the federal tax deposits (Form 501) for the period, and the employer's quarterly tax return (Form 941); prepare the employer's quarterly federal tax return with 100 percent accuracy on numerical data and no errors in entries and in compliance with the law.

PERFORMANCE ACTIONS:

7.3301 List employees by social security account number, name, and total FICA earnings for quarter up to current FICA maximum.

7.3302 Add earnings as listed, to prove total.

7.3303 Enter totals in indicated spaces.

7.3304 Determine the total federal tax withheld for the quarter and enter in appropriate space.

7.3305 Compute FICA tax liability and enter in appropriate space.

7.3306 Add federal tax withheld and FICA tax liability to determine total federal liability of quarter.

7.3307 Prepare Schedule B to indicate the federal liability by pay period, month, and quarter total and list corresponding deposits according to the completed 501 cards.

7.3308 Compute final deposit required by subtracting the total deposits previously made from the total federal liability. Enter this figure in appropriate block on Schedule B.

7.3309 Total Schedule B deposits and subtract from total liability on page one.

7.3310 Prepare 501 card for final deposit determining above.

7.3311 Proofread the preprinted information for accuracy.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.33 PREPARE EMPLOYER'S QUARTERLY FEDERAL TAX RETURNS (FORM 941)

SUGGESTED INSTRUCTION TIME: 5 Hours

PERFORMANCE STANDARDS:

- Using the materials provided by the instructor, prepare the employer's quarterly federal tax return with 100 percent accuracy in computations, correct entries, and in compliance with the law.

RELATED TECHNICAL INFORMATION:

Tax Guide for Small Business, Publication 334, Internal Revenue Service, 1980 (Change due Oct. 1981)

MODULE	7.01	OFFICE PROCEDURES
TASK	7.34	PREPARE EMPLOYER'S ANNUAL RECONCILIATION REPORTS OF INCOME TAX WITHHELD (FORM W-3)

PERFORMANCE OBJECTIVE:

Given the necessary completed withholding statement and necessary forms, complete the employer's annual reconciliation report of income tax withheld (W-3).

PERFORMANCE ACTIONS:

7.3401	Sort all W-2, W-2P, or 1099 Forms in preparation for filling out the W-3 Forms. Prepare a W-3 for each type form.
7.3402	Fill in "Payer's identifying number" with the "Employer's identification number."
7.3403	Enter the number of forms accompanying the W-3 form.
7.3404	Place and "X" in the proper box to identify which forms being sent--Form w-2, W-2P, or Form 1099.
7.3405	Type the Employer's name, address, and ZIP Code in box marked for this purpose.
7.3406	Mark an "X" in the correct boxes to show whether the forms are "original" or "corrected" and whether they all are "With taxpayer identifying number" or "Without taxpayer identifying number."
7.3407	Have form signed by person in authority, type title and date of preparation.
7.3408	Send the original along with forms stated in step 4 to the Internal Revenue Service and keep a copy on file at place of business.

SUGGESTED INSTRUCTIONAL TIME: 5 Hours

PERFORMANCE STANDARDS:

- Using the provided withholding statements and necessary forms, complete an employer's reconciliation report of income tax withheld.

MODULE	7.0	OFFICE PROCEDURES
TASK	7.35	PREPARE STATE UNEMPLOYMENT TAX RETURN

PERFORMANCE OBJECTIVE:

Given the employer's state unemployment tax liability and the appropriate form, prepare the state unemployment tax return with 100 percent accuracy on numerical data and in compliance with the state law.

PERFORMANCE ACTIONS:

7.3501 Determine amount to be paid according to instructions with applicable state unemployment tax return.

7.3502 Complete form according to instructions with applicable state unemployment tax return.

SUGGESTED INSTRUCTION TIME: 5 Hours

PERFORMANCE STANDARDS:

- Using the materials provided by the instructor, prepare the employer's state unemployment tax return with 100 percent accuracy in computations and entries and in compliance with the state law.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.36 REPLACING AND STORING SUPPLIES

PERFORMANCE OBJECTIVES:

Given a typewriter, eraser, a list of items to be purchased and a list of items to be shipped, plus three purchase order forms, and three shipping order forms, type correctly three shipping orders for equipment and supplies, plus three purchase orders for items of office supplies and equipment from three different suppliers with 100 percent accuracy in items and information listed. Proper forms with legible carbon copies must be used; neatness and organization apply.

PERFORMANCE ACTIONS:

7.3601 Fill out requisition form.

7.3602 Locate supply catalog information.

7.3603 Requisitions are accurate as to:

a. Supplier
b. Quanity
c. Sales price
d. Item description
e. Terms

7.3604 Channel requisition to proper office.

SUGGESTED INSTRUCTION TIME: 5 Hours

PERFORMANCE STANDARDS:

- 100 percent accuracy in ability to use office supply requisition catalog.
- 100 percent accuracy in item identification and quanity required on requisition or purchase order neatly filled out with carbon copy legible.

MODULE	7.0	OFFICE PROCEDURES
TASK	7.37	TAKE INVENTORY

PERFORMANCE OBJECTIVE:

Given a set of prepared inventory cards, blank inventory cards, and equipment in the immediate office, verify the accuracy of the inventory cards and make necessary changes with 100 percent accuracy and complete new inventory cards neatly and legibly.

PERFORMANCE ACTIONS:

7.3701 Assemble prepared inventory cards of list items to be counted.

7.3702 Maintain or take physical inventory or count total for one item.

7.3703 Record total on inventory worksheet or record.

7.3704 Repeat steps 2 and 3 for each item, if directed to do so.

7.3705 Make necessary changes with 100 percent accuracy and complete new inventory cards or record.

SUGGESTED INSTRUCTION TIME: 2 Hours

PERFORMANCE STANDARDS:

- Identifies equipment items listed on inventory cards with 95 percent accuracy and makes a 100 percent accurate count.
- Picks up unlisted items on inventory record with proper nomenclature and serial number.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.38 WORD PROCESSING - TERMINOLOGY

PERFORMANCE OBJECTIVE:

Given a list of 40 terms, 15 of which are related to word processing and have spelling errors, demonstrate the ability to correctly identify, spell, and define those 15 related to word processing with an accuracy of 80 percent.

PERFORMANCE ACTIONS:

7.3801 Identify word processing terms.

7.3802 Spell out word processing terms.

7.3803 Define word processing terms.

7.3804 Use word processing terms.

SUGGESTED INSTRUCTION TIME: 1 Hour

- Suggested instruction time includes presentation, demonstration, application and examination phases of contact hours of instruction.

PERFORMANCE STANDARDS:

- Identify, spell, and define word processing terms with 80 percent accuracy.

RELATED TECHNICAL INFORMATION:

- Spelling rules.
- The word processing concept.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.39 EMPLOYING WORD PROCESSING CONCEPTS IN AN OFFICE

PERFORMANCE OBJECTIVE:

Given a hypothetical traditional office situation, demonstrate a conceptual knowledge of structuring a word processing system by devising a plan, to the satisfaction of the instructor, to convert the traditional office to a word processing structured system. The plan must appear to implement the concept and be workable.

PERFORMANCE ACTIONS:

7.3901 Define the traditional office and the word processing center. Compare the structure of both the traditional and the word processing center.

7.3902 Plan a visit to a traditional office and a word processing center in the city to compare the structure of the two offices.

7.3903 Assemble information and directions.

7.3904 Devise a plan according to prior instruction and information using references that may be provided by instructor.

7.3905 Review the plan to ensure that it does convert the traditional office to a word processing structured system and is workable.

7.3906 Interpret the plan to the teacher, if necessary.

SUGGESTED INSTRUCTION TIME: 2 Hour

PERFORMANCE STANDARDS:

- Explain how word processing concepts are employed in the modern office to the satisfaction of the instructor.

RELATED TECHNICAL INFORMATION:

- Word processing concept.
- Employing word processing concept in the modern office.

MODULE	7.0	OFFICE PROCEDURES
TASK	7.40	PROOFREAD AND REVISE DOCUMENTS - WORD PROCESSING

PERFORMANCE OBJECTIVE:

Given a typewriter (power typewriter or word processing machine, if available), and three rough draft (or prerecorded on word processing machine) documents containing errors, demonstrate the ability to locate and correct errors by producing three error free documents (or playbacks). The documents must be mailable copy produced within designated time limits.

PERFORMANCE ACTIONS:

7.4001 Proofread.

7.4002 Revise documents.

7.4003 Prepare drafts.

NOTE: These performance actions, a repetition of instruction previously conducted, are for the purpose of increasing skill by application.

SUGGESTED INSTRUCTION TIME: 5 Hours

PERFORMANCE STANDARDS:

- Proofread and revise rough draft documents to achieve a mailable copy or an improved new draft without changing the specifics and primary thought of the communications.
- To the instructor's satisfaction.

RELATED TECHNICAL INFORMATION:

- Proofreading: Proofreader marks.
- Word Processing Machine: Instructor's Manual (if possible)
- Mailable standards.
- Typing documents from rough drafts.
- Capitalization, punctuation, spelling, word-division rules.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.41 USE POWER TYPEWRITER - WORD PROCESSING
(SEE OPTION ON NEXT PAGE)

PERFORMANCE OBJECTIVE:

Given a power typewriter (word processing machine) and a document containing all number, symbols, alphabetic letters, and applications requiring use of all codes, demonstrate good manipulative techniques while recording, correcting errors, and playing back copy. Mailable copy must be produced in acceptable time limits while demonstrating good manipulative techniques.

PERFORMANCE ACTIONS:

7.4101 Assemble necessary supplies.

7.4102 Demonstrating basic text-editing functions:

a. Keying
b. Editing
c. Revising
d. Storing
e. Retrieving
f. Playing out
g. Centering
h. Underscoring

7.4103 Use and store magnetic media to produce a mailable copy.

SUGGESTED INSTRUCTION TIME: 8 Hours

PERFORMANCE STANDARDS:

- Produce a mailable copy with automatic typewriter (power keyboard).
- Demonstrate the primary capabilities of the automatic typewriter (power keyboard).
- To the instructor's satisfaction.

RELATED TECHNICAL INFORMATION:

- Mailable standards.
- Manufacturer's instruction manual on automatic typewriter.
- Capitalization, punctuation, spelling, and word-division rules.
- Automatic typewriter capabilities.
- Magnetic media characteristics.

MODULE	7.0	OFFICE PROCEDURES
TASK	7.41	USE POWER TYPEWRITER - WORD PROCESSING (SEE OPTION AT BOTTOM OF PAGE)

IN ABSENCE OF WORD PROCESSING MACHINES:

In absence of word processing machines in the classroom, it is recommended that stimulations and field trips for observation or hands-on experience be employed. In place of demonstrating the skill, the student will observe the skill or experience limited hands on familiarization.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.42 DATA PROCESSING - TERMINOLOGY

PERFORMANCE OBJECTIVE:

Given a list of 40 terms, 20 of which are related to data processing and have spelling errors, demonstrate the ability to correctly identify, spell, and define those 20 related to data processing with an accuracy of 80 percent.

PERFORMANCE ACTIONS:

7.4201 Identify data processing terms.

7.4202 Spell out data processing terms.

7.4203 Define data processing terms.

7.4204 Use data processing terms.

SUGGESTED INSTRUCTION TIME: 1 Hour

Suggested instruction time includes presentation, demonstration, application and examination phases of contact hours of instruction.

PERFORMANCE STANDARDS:

- Identify, spell, and define data processing terms with 80 percent accuracy.
- State briefly the concept of data processing.

RELATED TECHNICAL INFORMATION:

- Spelling rules.
- The data processing concept.

MODULE	7.0	OFFICE PROCEDURES
TASK	7.43	RECOGNIZE COMPUTER CONCEPTS - DATA PROCESSING

PERFORMANCE OBJECTIVE:

Given a list of data processing machines, identify the use of each, verbally or by other means as directed by teacher with 100 percent accuracy in acceptable time limits as determined by problem complexity.

Given a problem to process through a computer, construct a flow chart using the correct symbolism and label each step appropriately with 100 percent accuracy in acceptable time limits as determined by problem complexity.

PERFORMANCE ACTIONS:

7.4301 Identify basic data processing machines.

7.4302 Work with data entry. (Actual or simulation)

7.4303 Construct a basic program flow chart.

7.4304 Construct a basic system flow chart.

SUGGESTED INSTRUCTION TIME: 1-5 Hours

PERFORMANCE STANDARDS:

- Ability to define and identify symbols used in machine processed data and fields, rows, columns, etc.
- Demonstrate knowledge and status of information entered into computer and the controls on data entered.
- Demonstrate knowledge of what types of information goes into the computer.
- Demonstrate knowledge of what the computer does to information entered.
- Demonstrate the ability to control data that comes out of the computer.
- Demonstrate ability to check the accuracy of data, draw a program flow chart, and follow through.
- Demonstrate knowledge of computer concepts and do basic systems flow chart for most common jobs.

RELATED TECHNICAL INFORMATION:

- Uses and capabilities of each machine.
- Definition of fields, rows, columns, etc.
- Symbols used in machine processed data.
- Computer information processes.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.44 LOCATE EMPLOYMENT OPPORTUNITIES

PERFORMANCE OBJECTIVE:

Given job placement information such as newspaper ads and personal contacts, list a minimum of ten specific Business and Office Education related jobs in the community. One week will be allowed to complete the task.

PERFORMANCE ACTIONS:

7.4401 Identify job opportunity areas as related to training, skills, and interests.

7.4402 Contact (or list) various employment opportunity sources:

a. Job placement office
b. Want ads
c. Employment Security
d. Other sources such as family, friends, school officials, etc.

7.4403 Estimate competition for job opportunities (number of other persons wanting same job) and target enough job opportunities to statistically qualify for one opportunity.

SUGGESTED INSTRUCTION TIME: 2 Hours (Over a one week period allowed for students to complete the task.)

PERFORMANCE STANDARDS:

Student must list a minimum of ten specific Business and Office Education related jobs in the community as advertised in the newspaper or media or through personal contacts. The jobs must be currently available.

RECOMMENDED REFERENCE:

Gibson, Roscoe R., Teaching Techniques in Developing Job Seeking Skills, Jefferson City, MO: Division of Career and Adult Education, Missouri Department of Elementary and Secondary Education, 1976. (Comprehensive guide with transparency masters and suggestions for all stages of job seeking.)

MODULE 7.0 OFFICE PROCEDURES

TASK 7.45 PREPARE RESUME

PERFORMANCE OBJECTIVE:

Given examples of suitable resume/personal data sheets, prepare and type a personal resume on paper acceptable to the instructor with all errors acceptably corrected.

PERFORMANCE ACTIONS:

7.4501 Define the basic purpose of the resume.

7.4502 Outline the essential information a resume or personal data sheet should contain:

a. Personal data such as name, address, telephone, age, physical descriptions, martial status, etc.
b. Job objective or skills offered
c. Training
d. Experience
e. Accomplishments, interests, etc.
f. References

7.4503 Prepare a resume that is acceptable to the instructor.

SUGGESTED INSTRUCTION TIME: 1 Hours

PERFORMANCE STANDARDS:

Prepare resume/personal data sheets on paper and in a form acceptable to the instructor with all errors acceptably corrected.

RECOMMENDED REFERENCE:

Gibson, Roscoe R., Teaching Techniques in Developing Job Seeking Skills, Jefferson City, MO: Division of Career and Adult Education, Missouri Department of Elementary and Secondary Education, 1976.

Job Seeking - How and Where, Columbia, SC: South Carolina Department of Education, 1981.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.46 COMPOSE FOLLOW-UP LETTER

PERFORMANCE OBJECTIVE:

Given a case situation by the instructor or from the textbook, compose and type a follow-up letter appropriate to the job application or interview situation and in mailable form.

PERFORMANCE ACTIONS:

7.4601 Assemble necessary information, supplies, and equipment.

7.4602 Compose a follow-up letter, in mailable form, to a given job application or interview situation.

7.4603 Proofread the letter, correcting all errors.

SUGGESTED INSTRUCTION TIME: 1 Hours

PERFORMANCE STANDARDS:

- Compose and type a follow-up letter appropriate to a given job application or interview situation in mailable form.

RELATED TECHNICAL INFORMATION:

- Mailable standards.
- Capitalization, punctuation, grammar, word-division rules.

RECOMMENDED REFERENCE:

Gibson, Roscoe R., Teaching Techniques in Developing Job Seeking Skills, Jefferson City, MO: Division of Career and Adult Education, Missouri Department of Elementary and Secondary Education, 1976.

Job Seeking - How and Where, Columbia, SC: South Carolina Department of Education, 1981.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.47 COMPOSE APPLICATION LETTER

PERFORMANCE OBJECTIVE:

Given a newspaper ad for a business position, compose a letter of application. The letter must be mailable and include necessary personal information.

PERFORMANCE ACTIONS:

7.4701 Assemble necessary information, supplies, and equipment.

7.4702 Compose a letter of application for a given business position. Include necessary information.

7.4703 Proofread the letter, correcting all errors.

SUGGESTED INSTRUCTION TIME: 1 Hours

PERFORMANCE STANDARDS:

- Compose a letter of application for a business position advertised in the newspaper and suitable for the skills and experience of the student or for a hypothetical position described by the instructor. Include necessary personal information and prepare the letter in mailable form.

RELATED TECHINCAL INFORMATION:

- Mailable standards.
- Capitalization, punctuation, grammar, word-division rules.

RECOMMENDED REFERENCE:

Gibson, Roscoe R., Teaching Techniques in Developing Job Seeking Skills, Jefferson City, MO: Division of Career and Adult Education, Missouri Department of Elementary and Secondary Education, 1976.

Job Seeking - How and Where, Columbia, SC: South Carolina Department of Education, 1981.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.48 COMPLETE APPLICATION FORM

PERFORMANCE OBJECTIVE:

Given a job application form blank, complete the form with all information accurate, neatly typed and aligned in form blanks.

PERFORMANCE ACTIONS:

7.4801 Assemble minimum necessary information:

a. Personal information such as name, address, date of birth, etc.
b. Data related to applicant such as social security number, etc.
c. Schooling or training information
d. Past employment record
e. References

7.4802 Complete application form following directions carefully with neat, aligned entries.

7.4803 Proofread the completed form for errors or incomplete blanks.

SUGGESTED INSTRUCTION TIME: 1 Hours

PERFORMANCE STANDARDS:

- Complete application form blank with all information accurate, neatly typed and aligned in form blanks to the instructor's satisfaction.

RECOMMENDED REFERENCE:

Gibson, Roscoe, R., Teaching Techniques in Developing Job Seeking Skills, Jefferson, MO: Division of Career and Adult Education, Missouri Department of Elementary and Secondary Education, 1976.

Job Seeking - How and Where, Columbia, SC: South Carolina Department of Education, 1981.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.49 INTERVIEW FOR JOB

PERFORMANCE OBJECTIVE:

Given instruction on how to interview for a job, a job interview checklist, and a mock job interview, complete a job interview to the satisfaction of the instructor.

PERFORMANCE ACTIONS:

7.4901 Prepare for the interview.

a. Prepare personal appearance
b. Prepare necessary information, references, or other material for interview
c. Prepare for typical interview questions

7.4902 Arrive at appropriate time and identify yourself and your purpose or appointment.

7.4903 Give a good impression in meeting the interviewer.

7.4904 Exchange essential information with interviewer to reflect your job skills, training, and experience as well as personality. In addition, learn about the job opportunity and employer.

SUGGESTED INSTRUCTION TIME: 2 Hours

PERFORMANCE STANDARDS:

- Complete a mock job interview to the satisfaction of the instructor following given checklists and suggested procedures.

RECOMMENDED REFERENCES:

Gibson, Roscoe, R., Teaching Techniques in Developing Job Seeking Skills, Jefferson City, MO: Division of Career and Adult Education, Missouri Department of Elementary and Secondary Education, 1976.

Job Seeking - How and Where, Columbia, SC: South Carolina Department of Education, 1981.

OUTCOME-REFERENCED MEASURES

MODULE 7.0, OFFICE PROCEDURES

MODULE	7.0	OFFICE PROCEDURES
TASK	7.03	DISPLAY PHYSICAL POISE IN PERSONAL DEVELOPMENT

OUTCOME-REFERENCED MEASUREMENT (7.03)

Given instruction, display physical poise in the business setting to the instructor's satisfaction, by proper demonstration of the following:

7.0301 Demonstrate proper posture.

7.0302 Demonstrate appropriate walk.

7.0303 Demonstrate appropriate way to sit.

a. Demonstrate appropriate way to enter or leave a car.
b. List do's and don'ts for getting out of a car.

7.0304 Demonstrate appropriate way to enter or leave a room.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.04 HUMAN RELATIONS SKILLS IN PERSONAL DEVELOPMENT

OUTCOME-REFERENCED MEASUREMENT (7.04):

The following "Personality Checkup" is taken from:

Steward, Jeffrey, R., Jr.; Blockhus, Wanda A.; Reigle, Charles E.; and Schroeder, Betty L. Office Procedures, New York: Gregg Division McGraw-Hill Book Company, 1980, pp 59-60.

"On a separate sheet of paper, copy the following "Personality Checkup" table. Then read each of the items (a-y) and put a check mark in the appropriate column for each item--Yes, Sometimes, or No."

PERSONALITY CHECKUP

Do You		Yes	Sometimes	No
a.	Accept responsibility?			
b.	Try not to hurt the feelings of others?			
c.	Act friendly toward others?			
d.	Think ahead about the result of your actions?			
e.	Do things for others unasked?			
f.	Respect other people?			
g.	Respect the property of others?			
h.	Cooperate with others in a group?			
i.	Get a job done without reminders?			
j.	Initiate new activities yourself?			
k.	Have confidence in yourself?			
l.	Keep your clothing neat and clean?			
m.	Avoid too many snacks between meals?			
n.	Get enough rest and fresh air?			
o.	Take criticism as well as give it?			
p.	Consider the feelings of others?			
q.	Have a desire to succeed?			
r.	Feel you can address a group without being self-conscious?			
s.	Pay careful attention to instructions?			
t.	Learn from mistakes?			
u.	Have a ready smile?			
v.	Dress according to the situation?			
w.	Sit, stand, and walk with good posture?			
x.	Tackle tasks with energy and enthusiasm?			
y.	Require a minimum of supervision to complete assigned tasks?			

Form from Steward, p. 50.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.05 DISPLAY POSITIVE ATTITUDE TOWARD WORK - PERSONAL DEVELOPMENT

OUTCOME-REFERENCED MEASURES (7.05):

The following form is taken from:

Steward, Jeffrey R., Jr.; Blockhus, Wanda A.; Reigel, Charles E.; and Schroeder, Betty L. Office Procedures, New York: Gregg Division McGraw-Hill Book Company, 1980, p. 37, (reproduced for articulation purposes only.)

Role play or simulation may be used for measurement along with observation. The following role play is taken from Office Procedures, p.37, and allows two students to participate directly.

> "Scene: One of (the) responsibilities as a supervisor is to prepare an evaluation of performance for each employee. Today you are meeting with an employee (employee: with your supervisor) concerning the following evaluation. (Supervisor) "Your aim is to develop the strong points the evaluation reveals and correct the weak ones." (Employee) Approach the task with the proper attitude toward work. Be conscientious, pleasant, tactful, and cooperative. Display the ability to accept constructive criticism gracefully. One student act as the supervisor and another student is to act as the employee.

Name _____ Position _____

PERSONAL QUALITY	COMMENTS
ADAPTABILITY	
Learns job requirements quickly	
Makes expected progress	
Does more than routine work	
Shows alertness and intelligence	
Learns quickly	
Remains calm and poised at all times	
Makes suggestions and tries new methods	
ATTENDANCE	
Never misses a day of work except for sickness	
Not absent from office for periods over 1 1/2 hours	
ATTITUDE	
Has great interest in job	
Makes great effort to progress	
Is enthusiastic	
Accepts suggestions and supervision	
Is cooperative	
Works well without constant supervision	
Is loyal	
Expects to advance on merit	
Complies with office rules	

MODULE 7.0 OFFICE PROCEDURES

TASK 7.05 DISPLAY POSITIVE ATTITUDE TOWARD WORK - PERSONAL DEVELOPMENT

OUTCOME-REFERENCED MEASURES (7.05): (Continued)

PUNCTUALITY	
Arrives at work on time	
Is ready to work upon arrival at the work station	
Does not watch the clock	
Does not disappear frequently from work station	
Does not stop working ahead of time	
OVERALL RATING	

MODULE 7.0 OFFICE PROCEDURES

TASK 7.06 SET UP WORK STATION

OUTCOME-REFERENCED MEASURE (7.06):

Given a drawing of a typical secretarial desk and work station, symbols for typical items found on or in the average secretarial desk, prepare a chart or outline, indicating where each applicable item typically or should be found (according to the textbook or teacher's recommendations). Categories of location are: Top of Desk, Center Drawer, Top Storage Drawer, and Single File Drawer. The simulation desk has only two drawers on the right.

ITEM	Top of Desk	Center Drawer	Top Storage Drawer	Single File Drawer
Telephone				
Calendar				
Calculator				
Stapler				
Staple remover				
Scissors				
Paper clips				
Rubber bands				
Typing paper				
Pens and pencils				
In Basket				
Personal items				
Word Speller				
Memo pad				
Correction fluid, paper				
Carbon paper				

For articulation, the measurement concept is taken from:

Steward, Jeffrey R., Jr.; Blockhus, Wanda A.; Reigel, Charles E.; and Schroeder, Betty L. Office Procedures, New York: Gregg Division McGraw-Hill Book Company, 1980, pp. 51-52.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.06 SET UP WORK STATION

OUTCOME-REFERENCED MEASURE (7.06):

Provide outline sketches of three rooms and a reference sheet of scale drawings of furniture and equipment, make a sketch of an office layout by sketching in, to scale, furniture and equipment and labeling each piece with the letter which corresponds to the one on the reference sheet. Assume the office is occupied by one administrator and one secretary.

Guide:

1. Identify kinds of equipment and furniture needed in each office or room.

    a. Reception room

        1. Couch and chairs
        2. Tables and lamps
        3. Secretary's desk and chair
        4. Typewriter and transcribing machine
        5. File cabinet
        6. Telephone

    b. File room or file and copy room

        1. Safe
        2. File cabinets
        3. Tables
        4. Copy machine

    c. Administrator's Office

        1. Executive desk and chair
        2. Table and chair's for clients, visitors
        3. Telephone
        4. Bookshelves
        5. Dictating machine

2. List below each sketch, furniture and equipment included in the office.

3. Sketch in, to scale, spaces for furniture and equipment in each office.

    a. Coat rack should be near entrance.
    b. Secretary should be located near reception area.

OUTCOME-REFERENCED MEASURE (7.06): (Continued)

c. Office staff should not cross through reception area on way to or from work.
d. Secretary should be adjacent to files.
e. Occupants of private offices should be placed to see the door.
f. Aisles should be wide enough to accommodate traffic.
g. Each employee should have access to aisle.
h. There should be enough space between desks and other furniture to prevent crowding and disruption.
i. All personnel should have access to outside light.
j. All personnel should have adequate light.
k. Equipment should be arranged so that majority of work would flow with minimum backings.

4. Letter each piece of furniture and equipment with corresponding letter on reference sheet.

5. Recommended: Use three pages of Graph Paper representing room sizes and scale outlines of office furnishings and equipment. (See V-TEC Catalog for Legal Secretary and Court Reporter.)

OUTCOME-REFERENCED MEASURES (7.1502-7.1505):

"Practice saying the following sentences aloud to improve your speech habits. Pronounce every word clearly and distinctly. Then have a classmate listen to you, and ask him to make a note of the words that he feels need your special attention.

(a) For distinct enunciation, every word, every syllable, and every sound must be given its proper form and value.

(b) Think of the mouth chamber as a mold in which the correct form must be given to every sound.

(c) Move your lips noticeably.

(d) Your teeth should never be kept closed while you are talking.

(e) As your voice is the most direct expression of your innermost self, you should do full justice to yourself and use your voice to its fullest advantage.

(f) You may know what you are saying, but others won't unless you make your meaning clear to them.

(g) Through practice we can learn to speak more rapidly, but still distinctly.

(h) Good speech is within the reach of everyone who practices it.

(i) The courtesy of a smile apparent in face-to-face conversation can be conveyed by telephone only through a smiling voice.

WORDS FOR SPECIAL ATTENTION

Word	Syllabic Division and Accent	Phonetic Spelling

Archer, Brecker, Stewart, General Office Procedures Workbook, (NY: Gregg McGraw-Hill Book Co., 1975), p. 33.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.15 ORAL COMMUNICATIONS IN BUSINESS

OUTCOME-REFERENCED MEASURE (7.15):

"Complete the following conversation between a receptionist and a caller who has asked to see the president of your company. Make it realistic.

"Caller approaches the reception desk and is greeted by the receptionist.

"Receptionist says: _____

"Caller responds, asking to see the president: _____

"Receptionist asks about an appointment: _____

"Caller explains that he has a complaint and that he has been a steady customer for twenty years: _____

"Receptionist asks the nature of the complaint: _____

"Caller explains that his statement of account has not been corrected for three months because of the company's failure to record a payment: _____

"Receptionist expresses regret for the nuisance. Explains that a new centralized accounting system has been installed and that there was some delay in getting everything in full operation. Suggests that the caller see Mr. X, the supervisor of the accounts receivable section: _____

"Caller agrees to see Mr. X: _____

"Receptionist thanks the caller and calls a messenger to escort the caller to the proper destination:" _____

Archer, Brecker, Stewart, General Office Procedures Workbook, (NY: Gregg McGraw-Hill Book Co., 1975), p. 25.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.16 PERFORM RECEPTIONIST DUTIES

OUTCOME-REFERENCED MEASURE (7.16):

The Performance Actions may be used as a checklist.

Refer to the "Checklist for Greeting Visitors," Task 7.16. The checklist may be checked either "yes" or "no" or used as a rating scale.

The following checklist was taken from:

South Carolina State Department of Education, Performing Receptionist Activities, Greet Callers and Visitors, Module III D-5 & 6, Clemson University: Vocational Education Media Center (State Office of Vocational Education, Office Occupations Education), 1977, (coordinated with V-TEC Secretarial Catalog).

The checklist may be used with the suggested performance scale or as a "yes" or "no" competence checklist.

INSTRUCTOR'S CHECKLIST

PERFORMANCE SCALE

N/A - The skill was not applicable to this situation
Poor - The student can not perform the skill
Fair - The student can perform this skill satisfactorily but requires periodic supervision and/or assistance
Good - The student can perform this skill effectively without assistance and/or supervision
Excellent - The student can perform this skill without supervision and/or assistance with proficiency in speed

ACTIVITY	Evaluation N/A	Poor	Fair	Good	Excellent
1. Greeted the visitor in a friendly manner					
2. Was courteous					
3. Was helpful to visitor					
4. Learned the visitor's name and used it appropriately					
5. Made the visitor feel at ease					
6. Avoided slang					
7. Used correct grammar					
8. Used a pleasant tone of voice					
9. Showed interest in visitor					
10. Directed the visitor to the proper room					
11. Gave clear information					
12. Introduced visitor properly					
13. Maintained company policy					

7.16, 7.17

Telephone Message

FOR _____

DATE _____ TIME _____

WHILE YOU WERE OUT

M. _____

FROM _____

PHONE No. _____

	TELEPHONED		PLEASE PHONE
	RETURNED YOUR CALL		WANTS TO SEE YOU
	CAME TO SEE YOU		WILL CALL AGAIN

MESSAGE _____

TAKEN BY

Telephone Message

FOR _____

DATE _____ TIME _____

WHILE YOU WERE OUT

M. _____

FROM _____

PHONE No. _____

	TELEPHONED		PLEASE PHONE
	RETURNED YOUR CALL		WANTS TO SEE YOU
	CAME TO SEE YOU		WILL CALL AGAIN

MESSAGE _____

TAKEN BY

Telephone Message

FOR _____

DATE _____ TIME _____

WHILE YOU WERE OUT

M. _____

FROM _____

PHONE No. _____

	TELEPHONED		PLEASE PHONE
	RETURNED YOUR CALL		WANTS TO SEE YOU
	CAME TO SEE YOU		WILL CALL AGAIN

MESSAGE _____

TAKEN BY

Telephone Message

FOR _____

DATE _____ TIME _____

WHILE YOU WERE OUT

M. _____

FROM _____

PHONE No. _____

	TELEPHONED		PLEASE PHONE
	RETURNED YOUR CALL		WANTS TO SEE YOU
	CAME TO SEE YOU		WILL CALL AGAIN

MESSAGE _____

TAKEN BY

MODULE	7.0	OFFICE PROCEDURES
TASK	7.17	EFFECTIVE TELEPHONE TECHNIQUES

OUTCOME-REFERENCED MEASURE (7.17):

1. See the Checklist, "Answering the Telephone" in Task 7.17.

In addition, see:

South Carolina State Department of Education, Performing Receptionist Activities, Answer the Telephone, Module III A-12, Clemson University: Vocational Education Media Center (State Office of Vocational Education, Office Occupations Education), 1977, (coordinated with V-TEC Secretarial Catalog).

2. See the Checklist, "Place Telephone Calls," in Task 7.17.

In addition see:

South Carolina State Department of Education, Performing Receptionist Activities, Placing Telephone Calls, Module III B-15, Clemson University: Vocational Education Media Center (State Office of Vocational Education, Office Occupations Education), 1977, (coordinated with V-TEC Secretarial Catalog).

MODULE	7.0	OFFICE PROCEDURES
TASK	7.19	REPROGRAPHICS
ACTION	7.1901	MANUSCRIPT FOR REPROGRAPHICS

OUTCOME-REFERENCED MEASURE (7.1901):

Type a rough draft, then proofread, then type a stencil, and make ten copies on the ink duplicator. Collate and bind the material as required.

FINDING OUT FACTS IN business

A Report to Mr. Sutton
By Sara Jane Brown

Noone in the world of business is expected to know everything. However, every one is expected to know something about where to get information when it is needed.

WHERE AND HOW TO FIND INFORMATION

In order to find all types of facts, simply pay a visit to the reference section of a public, business, or professional library. Those materials that are referred to rather frequently should either be subscribed to or purchased.

Point 1. Always write your instructions down carefully. Don't hesitate to ask questions of your supervisor in order to clarify an assignment .

Point 2. Learn quickly the orgainzation of each reference work used, for example, tables of contents, page headings, indexex, and so forth.

From Today's Secretary, January, 1973

MODULE	7.0	OFFICE PROCEDURES
TASK	7.19	REPROGRAPHICS
ACTION	7.1901	FINANCIAL FORM FOR REPROGRAPHICS

OUTCOME-REFERENCED MEASURE (7.1901):

Type a rough draft, then proofread, then type a stencil and make ten copies on the ink duplicator. Collate and bind the material as required.

(Sample for articulation purposes only, source unknown)

BLUE LAGOON PROPERTIES

BEACHFRONT, GEORGIA

By Lagoon, Inc., Realtors

TOWNHOUSES

Unit	Bedrooms	Purchase Price	Down Payment	20-Year Mortgage	Monthly Payment to Principal and Interest
580	3	$79,500	$19,900	$59,600	$517.24
582	3	79,000	19,800	59,200	513.77
584	2	64,000	16,000	48,000	416.57
586	3	79,000	19,800	59,200	513.77
588	2	64,500	16,200	48,300	419.17
590	2	85,000	21,300	63,700	552.82
592	2	84,000	21,000	63,000	546.75
		OCEAN VILLAS			
340	2	$65,300	$16,300	$49,000	$425.25
341	1	52,000	13,000	39,000	326.22

November 16, 19--

Terms based on a twenty-five percent (25%) down payment (rounded) with a twenty (20) year repayment period. Interest rate at eight percent (8%) on loans under $46,000 and eight and one-half percent (8½%) on loans over $46,000.

MODULE	7.0	OFFICE PROCEDURES
TASK	7.19	REPROGRAPHICS
ACTION	7.1902	ONE PAGE FORM LETTER TO TYPE AND REPRODUCE IN FIVE COPIES

OUTCOME-REFERENCED MEASURE (7.1902):

Given a one page form letter, type it on a master and for reproduction on the duplicator machine.

Dear _____,

Century 21 Traxler Realty is pleased to announce the opening of the fabulous new subdivision, "Little River," on the east side of Greenville.

Four new model homes are now open for your inspection--Riverfront, Pebblestone, Brookview, and Sandcastle. These attractively decorated model homes reflect the style and experience of living you will enjoy at Little River. Any model homes or one of the three models soon to be constructed may be built on a site you may select in Little River.

These uniquely designed homes have been designed by Richard Winehart, a local architect, recognized for award winning home designs. They are constructed of the finest materials by Windglass Construction Company and will please the most discriminating in taste.

Please, stop by at your convenience and visit these new models. Agents will be on duty from 9:00 a.m. until 8:00 p.m. daily to answer any questions that you may have and assist you.

Sincerely yours,

Bill Barkroot, Broker

Glenda Thomason, Sales Manager

MODULE	7.0	OFFICE PROCEDURES
TASK	7.19	REPROGRAPHICS
ACTION	7.1903	CORRECT ROUGH DRAFT FOR PHOTOCOPY

OUTCOME-REFERENCED MEASURE (7.1903):

Prepare a rough draft and final copy appropriate for photocopy of a one-page document with all errors corrected neatly so they will not appear during photocopy.

FOR IMMEDIATE RELEASE:

JANE FULTON AWARDED SCHOLARSHIP

FOR 4 YEARS AT HAYNES STATE

Jane Mary Fulton (age 18), a 1972 graduate of Valley Stream High School, has been awarded a four-year scholarship to attend Hayes State University as a biology major, it was announced today by, H. Reed Hastings, Chairman of the board of trustees at Haynes State.

Awarded on the basis of personal character and academic performance, the scholarship is 1 or 4 presented each year to graduating seniors throughout the state interested in pursuing careers in the life sciences.

The daughter of Mr. & Mrs. Albert Fulton, of

Miss Fulton was elected to membership in the Valley Stream High honor society in her junior year. She was also secretary of the senior class, a runner-up in the country-wide oratorical competition, and co-captain of the cheerleeding squad for the school's athletic teams.

Today's Secretary, January, 1973

MODULE	7.0	OFFICE PROCEDURES
TASK	7.21	ESTABLISH A FILING SYSTEM

OUTCOME-REFERENCED MEASURE (7.21):

For articulation purposes only, refer to the exercises found in:

South Carolina State Department of Education, Developing a Records System, Module IV H-3, Clemson University: Vocational Education Media Center (State Office of Vocational Education, Office Occupations Education), 1977.

MODULE 7.0 OFFICE PROCEDURES

TASK 7.21 ESTABLISH A FILING SYSTEM

OUTCOME-REFERENCED MEASURE (7.21):

"Set up a filing system (combining two systems into one) for the notes that you have jotted down as you started through the correspondence needing to be filed. Type a list and present it to your boss (teacher) for approval."

Taken from Check-Out Activity I, IV H-4 & 5, Filing Alphabetically Basic Rules, Clemson, SC: Vocational Education Media Center, 1977. Activity repeated here for articulation.

Check-Out Activity I

Customer Shipping Invoices & Charges:

Dave's Meat Market, Colton, OH Sept. 5, 12
Swanson Wholesale Co., Canton, OH Sept. 1, 3, 7 Check for $155 Sept. 20
SWP Corporation, East Peru, ME August 27, 29, 31
Niles Construction, Niles, KS August 28,30 Check for $1,175 Sept. 12
Carroll's Orchards, Iberia, OH July 27, 29 Check for $735 August 7
Sternes' Nursery, Eure, NC July 15, July 30
Check from Sternes' Nursery, July 25
Stern Masonry Co., Bombay, NY July 31
Serle's Fruit Farms, Oxford, MS August 5, 7, 9, 17
Haskins & Sells, Oneco, CT July 17, 19
FMC Corporation, Laie, HI July 27, Aug. 15 Check of Aug. 30 $387.50

Delivery Records and Claims:

Niles Construction Co., Niles, KS July 3
Gulf Tourist Center, Barre, VT July 15
Airedale Camera Shop, Moscow, TX August 29
Valley Park Gold Course, Ozard, MI July 27, August 15
Cape Hope Restaurant Dubuque, IA, August 12, 15
Six Lakes Motel, Mingo, WV Sept. 3
Peel's Photo Studio, Troy, TX August 25, Sept. 7
Marion Lee-Morrison, Inc. Berne, NY August 12
Airedale Camera Shop, Lexington, TN Sept. 8
Yacht Owners Cooperative, Wilbaux, MT August 17
Amer-Strauss Co., Yolo, ME August 13, 25
Queen Anne's Museum, Mason, OH July 8
Joan's Cosmetic Studio, Reno, OH July 22
American Steel, Frankfort, OH August 5, 17

OUTCOME-REFERENCED MEASURE (7.21) (Continued)

Bills to Pay:
- Sept. Gas & Electric
- Sept. Garage Rental
- August & Sept. Water
- August Gas & Oil for Trucks
- Sept. Telephone Bills
- Newspaper Advertising for Aug. & Sept.
- TV Advertising for Sept.
- Insurance Premiums for Fire
- Insurance Premiums for Theft
- Insurance Premiums for Accident

Receipts for Paid Bills:
- Gas/Electric
- Gas & Oil
- Garage Rent
- Water
- Advertising on TV

Payroll & Taxes:
- Road Taxes
- State Taxes
- Federal Taxes
- FICA
- Payroll

MODULE	7.0	OFFICE PROCEDURES
TASK	7.21	ESTABLISH A FILING SYSTEM
ACTION	7.2103, a.	ALPHABETIC FILING

OUTCOME-REFERENCED MEASURE (7.2103, a):

"On the basis of rules learned, index the following names and indicate, by groups, the correct alphabetic order of the name."

Taken from Student Self-Check III, Basic Alphabetic Filing Rules, Section B, IV A-12-13, Filing Alphabetically Basic Rules, Clemson, SC: Vocational Education Media Center, 1977. Student Self-Check III is repeated here for articulation.

NAME	Alphabetic ORDER	UNIT 1	UNIT 2	UNIT 3
1.				
Ft. Henry Hospital	1	Fort	Henry	Hospital
Chas. Toadvine				
Pike St. Bakery				
RMK Co. Inc.				
2.				
Butler Bee Hive 198 Cresent Road Danville, Kentucky				
Butler Bee Hive 2911 Certre Pike Danville, Kentucky				
K Mart 1490 Dixie Hwy. Lexington, Kentucky				
K Mart 41 Newton Pike Lexington, Kentucky				
3.				
Gerald K. Johnson				
Johnson Party Boat				
Jack the Electrician				
Jackson and Son Frame Shop				
4.				
Williams' Shoe Store				
Kenneth R. Williams				
Will's Motor Sales				
A. J. William and Co.				

MODULE	7.0	OFFICE PROCEDURES
TASK	7.21	ESTABLISH A FILING SYSTEM
ACTION	7.2103, a.	ALPHABETIC FILING

OUTCOME-REFERENCED MEASURE (7.2103, a): (Continued)

5.				
Mrs. Bruce Ferguson (Mary Ann)	_____	____	____	_____
Mrs. Gary House (Louise)	_____	____	____	_____
Mrs. James Anneken (Janet)	_____	____	____	_____
6.				
1775 Antique Shop	_____	____	____	_____
Restaurant of 4 Seas	_____	____	____	_____
59th St. Shop	_____	____	____	_____
Boutique on 2nd. Ave.	_____	____	____	_____

MODULE	7.0	OFFICE PROCEDURES
TASK	7.21	ESTABLISH A FILING SYSTEM
ACTION	7.2104	GEOGRAPHIC FILING

OUTCOME-REFERENCED MEASURE (7.2104):

Insert this page into your typewriter. In the right-hand column, type in the correct file-card sequence of the name in the left-hand column.

For geographic-file cards:

Ex.	Chicago 24, Illinois	Ex.	Illinois, Chicago
1.	Heathe, New Hampshire	1.	
2.	Dallas 13, Texas	2.	
3.	Richmond 17, Virginia	3.	
4.	Torreon, Coah / MEXICO	4.	
5.	Cristiano, Sao Paulo / BRAZIL	5.	
6.	Paris 2 / FRANCE	6.	

MODULE	7.0	OFFICE PROCEDURES
TASK	7.23	CROSS REFERENCE DOCUMENTS

OUTCOME-REFERENCED MEASURE (7.23):

(See: Student Self-Check IV, Cross Reference, IV A-15, Filing Alphabetically Basic Rules, Clemson, SC: Vocational Education Media Center, 1977.)

Index the following names and make a cross reference where necessary. The index and cross-reference must be accurate and acceptable to the instructor.

Sample attached.

(SAMPLE)

NAME	UNIT 1	UNIT 2	UNIT 3
Mrs. John T. Hartness (Sue Ryan)			
Regular File:	Hartness (John T.)	Sue	Ryan
Cross Reference:	Hartness	John	T. (Mrs.)
	SEE: Hartness, Sue Ryan (Mrs.)		
NAMES:			
B & F Roofing Co., Inc.			
Regular File:			
Cross Reference:			
J. Rawl Beckwith, Attorney			
Regular File:			
Cross Reference:			
Dr. T. R. Traxler			
Regular File:			
Cross Reference:			
Mrs. Nancy R. Stevenson			
Regular File:			
Cross Reference:			
Hightower P. T. A.			
Regular File:			
Cross Reference:			
James R. Miller			
Regular File:			
Cross Reference:			
Senator Howard N. Stilton			
Regular File:			
Cross Reference:			
Miss Nancy L. Jones			
Regular File:			
Cross Reference:			

	UNIT 1	UNIT 2	UNIT 3
NAMES:			
Holcrest Fiber Industries			
Regular File:	_____	_____	_____
Cross Reference:	_____	_____	_____
Crest and Peak Produce Co.			
Regular File:	_____	_____	_____
Cross Reference:	_____	_____	_____

TASK 7.36

Purchase Order No. 9241

RTC MANUFACTURING, BOX 15, GREENVILLE, SC 29606

TO:

DATE:

PLEASE SHIP AND BILL US FOR THE GOODS LISTED BELOW. IF FOR ANY REASON YOU CANNOT DELIVER WITHIN 30 DAYS, LET US KNOW AT ONCE. PLEASE REFER TO OUR PURCHASE ORDER NUMBER (ABOVE) IN ALL COMMUNICATIONS.

SHIP VIA:

QUANTITY	DESCRIPTION	YOUR CAT. NO.	UNIT PRICE	AMOUNT

NOTE: YOUR BILL TO US SHOULD INDICATE ALL YOUR USUAL DISCOUNTS.
PAYMENT WILL BE MADE UPON RECEIPT OF BILL WITH GOODS.

.....Purchasing Agent

Purchase Order No. 9242

RTC MANUFACTURING, BOX 15, GREENVILLE, SC 29606

TO:

DATE:

PLEASE SHIP AND BILL US FOR THE GOODS LISTED BELOW. IF FOR ANY REASON YOU CANNOT DELIVER WITHIN 30 DAYS, LET US KNOW AT ONCE. PLEASE REFER TO OUR PURCHASE ORDER NUMBER (ABOVE) IN ALL COMMUNICATIONS.

SHIP VIA:

QUANTITY	DESCRIPTION	YOUR CAT. NO.	UNIT PRICE	AMOUNT

NOTE: YOUR BILL TO US SHOULD INDICATE ALL YOUR USUAL DISCOUNTS.
PAYMENT WILL BE MADE UPON RECEIPT OF BILL WITH GOODS.

.....Purchasing Agent

TASK 7.36

Purchase Order No. 9449

RTC MANUFACTURING, BOX 15, GREENVILLE, SC 29606

TO:

DATE:

PLEASE SHIP AND BILL US FOR THE GOODS LISTED BELOW. IF FOR ANY REASON YOU CANNOT DELIVER WITHIN 30 DAYS, LET US KNOW AT ONCE. PLEASE REFER TO OUR PURCHASE ORDER NUMBER (ABOVE) IN ALL COMMUNICATIONS.

SHIP VIA:

QUANTITY	DESCRIPTION	YOUR CAT. NO.	UNIT PRICE	AMOUNT

NOTE: YOUR BILL TO US SHOULD INDICATE ALL YOUR USUAL DISCOUNTS.
PAYMENT WILL BE MADE UPON RECEIPT OF BILL WITH GOODS.

.....Purchasing Agent

TASK 7.36

ACE SUPPLY CO.
212 West Ave., Atlanta, GA 30333

Invoice 81290

BILL TO

SHIP TO

SHIP VIA

DATE

NO.	SET	DESCRIPTION	UNIT PRICE	AMOUNT

ACE SUPPLY CO.
212 West Ave., Atlanta, GA 30333

Invoice 81291

BILL TO

SHIP TO

SHIP VIA

DATE

NO.	SET	DESCRIPTION	UNIT PRICE	AMOUNT

ACE SUPPLY CO.
212 West Ave., Atlanta, GA 30333

Invoice 81292

BILL TO

SHIP TO

SHIP VIA

DATE

NO.	SET	DESCRIPTION	UNIT PRICE	AMOUNT

MODULE 7.0 OFFICE PROCEDURES

TASK 7.38 WORD PROCESSING - TERMINOLOGY

OUTCOME-REFERENCED MEASURE (7.38):

Identify, spell, and define the following 15 Word Processing Terms, given a total of 40 words from which to identify the terms.

15 Suggested Terms

Editing	(Edit)
Revising	(Revise)
Storing	(Store)
Retrieving	(Retrieve)
Playing out	(Playout)
Centering	
Underscoring	
Pitch	
Magnetic Media	
Edit	
Search	
Load	
Delete	
Store	
Keyboard	

Fifteen terms taken from:

Kutie, Rita and Huffman, Virginia. The WP Book, A Reference Manual, NY: John Wiley & Sons, 1980, pp. 421-429.

MODULE	7.0	OFFICE PROCEDURES
TASK	7.40	PROOFREAD AND REVISE DOCUMENTS - WORD PROCESSING

OUTCOME-REFERENCED MEASURE (7.40):

See the following source for suggestions concerning proofreading:

Kutie, Rita and Huffman, Virginia. The WP Book, NY: John Wiley & Sons, 1980, Section 8 (Proofreading and Editing, pp. 431-432), (General Proofreading and Editing Guides, pp. 433-435), (Special Proofreading and Editing Guides, pp. 438-440).

Proofread and correct the errors in three rough draft documents (one sample below).

April 16, 19--

Noxale China Company
3875 Lexington Boulevard
Richmond, VA 23234

Attention Mr. Gary Crane

Ladies and Gentlemen:

SUBJECT: Our Order No. 1483

The china that we ordered from you on March 15 arrived today by United Parcel Service. Our Receiving Clerk, signed for the merchandise although she said she could hear the rattling of broken pieces even before opening the package.

Of the six place settings that we had ordered for one of our customers, only one place setting was intact. The merchandise we have ordered from you in the past always had special cardboard forms protecting the individual pieces. This package had only loose pieces of paper around the china.

Since our customer wishes to have the six place settings for a special occasion, might we have a rush order placed on the replacement of the five place setting which were broken? The pattern is Autumn Leaves and is described in detail on our Order No. 1483.

Very truly yours,

THE MODERN GIFT SHOPPE

Howard Emerzian, Manager

PROFICIENCY REPORT

OFFICE PROCEDURES

PROFICIENCY REPORT
for

_____
Vocational Course

Student: _____

High School: _____

Vocational Center: _____

Date Training Initiated: _____
First Year Completed: _____
Second Year Initiated: _____
Second Year Completed: _____

Instructor: _____

DIRECTIONS: The purpose of the proficiency report is to communicate to the student, other instructors, or potential employers the abilities that a student has demonstrated to the instructor in vocational training. Mark each task as soon as possible after instruction or skills demonstration. If instruction is not aimed at task proficiency, or if only an orientation or introduction to the task was provided, DO NOT mark a proficiency level or mark Level 0. Levels 1-4 indicate that instruction was given and the proficiency may be interpreted as follows:

Level 0	No skill level demonstrated or proficiency training not given in the skill.
Level 1	Individual's skill level is not that generally expected for entry level employment.
Level 2	Individual's skill level probably is that generally expected for entry level employment, but the individual probably will need close on-the-job supervision for a while longer.
Level 3	Individual's skill level is that generally expected for entry level employment.
Level 4	Individual's skill level is equal to that of a worker with some on-the-job experience.

For further description of the levels of proficiency, see the "Proficiency Report" section of the Policies and Procedures Guide for Articulation Between The School District of Greenville County and Greenville Technical College.

Student's Name _____

PROFICIENCY REPORT

OFFICE PROCEDURES

TASKS

			Proficiency Level 0	Level 1	Level 2	Level 3	Level 4	Date Completed	Instructor's Initials
MODULE	7.0	OFFICE PROCEDURES							
TASK	7.01	Proper Techniques for Good Body Care Personal Development							
	7.02	Dress/Grooming - Personal Development							
	7.03	Displays Physical Poise in Personal Development							
	7.04	Exhibits Human Relations Skills in Personal Development							
	7.05	Displays Positive Attitude Toward Work - Personal Development							
	7.06	Ability to Set Up Work Station in Organized Manner							
	7.07	Ability to Plan Work and Complete Tasks so All Deadlines are Met							
	7.08	Ability to Determine Office Furnishings Needed and Plot a Suggested Layout and Make Recommendations							
	7.09	Demonstrated Basic Typewriter Functions							
	7.10	Typed Letters in Format Specified (Placement and Style)							
	7.11	Typed Correspondence or Reports from Rough Drafts Mailable and 100% Accuracy							
	7.12	Composed Business Compositions (Letters), Mailable and 100% Accuracy							
	7.13	Typed Pre-printed Business Forms, Mailable and 100% Accurate, Consistent Placement of Data							
	7.14	Transcribed Recorded Media by Typewriter with 100% Accuracy, According to Recorded Directions, Producing Mailable Copy							
	7.15	Demonstrated Acceptable Oral Communications Skills for Business, 100% Accurate in Content							
	7.1503	Ability to Deal with Difficult Words or Colloquialism							
	7.1504	Correct Grammar Demonstrated							
	7.1506	Courtesy and Tactfulness Demonstrated							

Student's Name _____

PROFICIENCY REPORT

OFFICE PROCEDURES

TASKS

			Proficiency Level 0	Level 1	Level 2	Level 3	Level 4	Date Completed	Instructor's Initials
MODULE	7.0	OFFICE PROCEDURES							
TASK	7.16	Performed Receptionist's Duties							
	7.1601	Greeted Visitors/Callers Satisfactorily							
	7.1604	Handled Incoming Phone Calls and Outgoing Calls as Instructed							
	7.17	Displayed Effective Telephone Techniques							
	7.1703	Placing Telephone Calls							
	7.1704	Answering Telephone Calls							
	7.18	Demonstrated Ability to Process Incoming and Outgoing Mail							
	7.1901	Demonstrated Ability to Reproduce on Stencil Duplicator							
	7.1902	Demonstrated Ability to Reproduce on Spirit Duplicator							
	7.1903	Demonstrated Ability to Reproduce on Photocopier							
	7.20	Collated Materials Satisfactorily							
	7.2101	Established an Alphabetic Filing System							
	7.2102	Established a Numeric Filing System							
	7.2103	Established Subject Filing System							
	7.2104	Established Geographic Filing System							
	7.22	Retrieved Materials From Files							
	7.23	Cross-Referenced Appropriate Documents							
	7.24	Maintained a Tickler File for One Week According to Checklist							
	7.25	Prepared an Itinerary and Made Travel Arrangements with 100% Accuracy in Timetable and According to Checklist							
	7.26	Completed Check Records and Wrote Checks for Given Situation with 100% Accuracy							
	7.27	Endorsed Checks with Three Different Methods							
	7.28	Prepared Deposit Slip for Currency and Coin Money with 100% Accuracy							
	7.29	Reconciled Bank Statements with 100% Accuracy in Calculations							
	7.30	Maintained a Petty Cash Account, 100% Accuracy in Calculations with Account in Balance							
	7.31	Prepared Payroll Records with 100% Accuracy in Entries and Computations							

Student's Name _____

PROFICIENCY REPORT

OFFICE PROCEDURES

TASKS

			Proficiency	Level 0	Level 1	Level 2	Level 3	Level 4	Date Completed	Instructor's Initials
MODULE	7.0	OFFICE PROCEDURES								
TASK	7.32	Prepared Federal Tax Deposits with 100% Accuracy in Computations, in Compliance with Law								
	7.33	Prepared Employer's Quarterly Federal Tax Returns (Form 941), with 100% Accuracy, in Compliance with Law								
	7.34	Prepared Employer's Annual Reconciliation Reports of Income Tax Withheld (W-3), with 100% Accuracy, in Compliance with Law								
	7.35	Prepared State Unemployment Tax Return with 100% Accuracy in Computations and in Compliance with State Law								
	7.36	Used Supply Catalog and Requisition or Purchase Order Forms for Replacing Supplies with 100% Accuracy in Item Identification								
	7.37	Conducted Simulation Inventory with 100% Accuracy								
	7.38	Identified, Spelled, and Defined Word Processing Terms with 80% Accuracy								
	7.39	Demonstrated Conceptual Knowledge of How Word Processing Concepts are Employed in Modern Offices								
	7.40	Proofread and Revised Rough Draft Copies to Achieve a Mailable Product - Simulating Word Processing								
	7.41	(As Applicable) Use Power Typewriter - Word Processing								
	7.42	Identified, Spelled, and Defined Data Processing Terms with 80% Accuracy								
	7.4303	Constructed a Basic Program Flow Chart								
	7.4304	Constructed a Basic System Flow Chart								
	7.44	Identified a Minimum of 10 Specific Business and Office Education Job Opportunities Locally								
	7.45	Prepared Resume, All Errors Corrected, in Acceptable Format								
	7.46	Composed Follow-Up Letter for Job Application								

Student's Name _____

PROFICIENCY REPORT

OFFICE PROCEDURES

TASKS

			Proficiency	Level 0	Level 1	Level 2	Level 3	Level 4	Date Completed	Instructor's Initials
MODULE	7.0	OFFICE PROCEDURES								
TASK	7.47	Composed Letter of Application for Job Position Advertised								
	7.48	Completed Job Application (Personnel) Form Satisfactorily								
	7.49	Satisfactorily Completed Mock Job Interview								

Comments:

Instructor's Signature: _____

EQUIPMENT LIST

MODULE 7.0, OFFICE PROCEDURES

1. Typewriters (one per student preferred, 75 percent manual and 25 percent electric recommended minimum)
2. Tape Recorder
3. Transcription Machines (for approximately 25 percent students preferred)
4. Filing Containers (one per student)

REFERENCES

MODULE 7.0, OFFICE PROCEDURES

RESOURCE MATERIALS

In developing outcome-referenced measures, the Task Force Committee for Business and Office Education consulted the following publications:

South Carolina Department of Education, Instructor's and Student's Manuals and support materials, forms, overhead transparencies, slides, and tapes supporting performance objectives as outlined in V-TEC Catalogs (Secretarial Catalog), Clemson University: Vocational Education Media Center (State Department of Education, Office of Vocational Education, Office Occupations Education), 1977.

Posting to Cash Record Book from Cash Proof Forms, VII A

Inspecting Material Received for Completeness, VII B

Posting Directly to Subsidiary Ledgers from Invoices, Credit Memos, and Checks, VII C

Computing Balance Column Amount in Ledger Accounts, VII D

Posting (Transferring) Entries from Journals to Ledgers, VII E

Processing Accounts Payable Invoices, VII F

Prepare Vouchers & Pay Vouchers, VII G

Computing Gross Pay from Punched Time Cards, VII I

Preparing Payroll Register, Employee Earnings' Records and Paychecks, VII J

Preparation of Federal and State Tax Deposits, VII K

Preparation of Employer's Quarterly Federal Tax Returns, VII L

Preparation of State Unemployment Tax Return, VII M

Petty Cash, VII N

REFERENCES

Alabama State Department of Education (V-TEC), A Catalog of Performance Objectives, Criterion-Referenced Measures and Performance Guides for Bookkeeping, Accounting, Payroll Clerk, Montgomery, AL: Division of Vocational Education, 1978.

Articulation Agreement: Piedmont Technical College - New Vocational Center, Greenwood, SC: Piedmont Technical College, 1980.

Articulation of Occupational Education Programs between Secondary Schools and Technical Institutes/Community Colleges Project, A State Articulated Instruction Objectives Guide for Occupational-Education Programs, State Pilot Model for Executive Secretary and Stenographer, Kenansville, NC: James Sprunt Institute (NC State Department of Public Instruction and NC State Department of Community Colleges), 1977.

Business and Office Education Section, Draft - Accounting (1981 draft of objectives Developed at the state level), Columbia, SC: South Carolina State Department of Education (Office of Vocational Education), unpublished, (1981).

Business Division, Business Division Catalog, Greenville Technical College, 1980-82, Greenville, SC: Greenville Technical College, 1980.

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